Inquisite Reporting Plug-In for Microsoft Office

Version 7.5

Getting Started

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Preface

Inquisite is an enterprise solution designed specifically for non-technical users to create surveys on the desktop and deploy them to the web. The Inquisite Reporting Plug-In for Microsoft Office makes the task of analyzing survey results easier. With the Reporting Plug-In, you can use Inquisite survey data to build custom reports in Excel and PowerPoint, retaining control over the appearance of your report. Because the survey data is “live” in the Excel and PowerPoint files, you can easily refresh the reports without having to recreate them. Simplifying the process of survey analysis contributes to more effective collaboration, helping all team members make better decisions.

This guide introduces the Reporting Plug-In and describes how to install the product. You will also learn how to generate and refresh reports and create custom chart templates to apply to your reports.

Support

For technical help, contact Customer Support during business hours Monday through Friday 8:00 AM—5:00 PM (CST).

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1 Introduction

Inquisite is an enterprise-level survey solution that lets organizations manage the entire survey process, from building and publishing the survey to analyzing survey results. With intuitive tools, Inquisite simplifies the tasks associated with running surveys. Simplified creation, deployment and analysis all promote business alignment through collaboration and the sharing of critical data.

The Inquisite Reporting Plug-In offers a powerful tool for analyzing survey data. With the Reporting Plug-In, you can build sophisticated and custom reports in Excel and PowerPoint and easily refresh the reports with new Inquisite data as often as needed. The Reporting Plug-In uses a wizard to guide users through the process of building the report.

The following options are available through the Reporting wizard:

- **Create a new report workbook or presentation**. Creates an Excel workbook with multiple worksheets or creates a PowerPoint presentation with one or multiple charts.

  When you create a new report workbook, you can filter on responses and dates and summarize the relationship between questions by selecting cross-tabulation questions. Other options include adding trending; collecting count and percent and descriptive statistics; summarizing ranking; creating pie graphs and bar charts; and displaying text and numeric responses.
- **Refresh an existing report workbook or presentation**. Updates an existing report or chart with new survey data. When you refresh an existing report, you can apply updated filter criteria (a different date range, for example) to adjust the report data that is displayed.
- **Import unformatted data**. Imports unformatted data into an Excel spreadsheet. You can specify filtering criteria when you choose this option.

For users who are upgrading the Builder, you will still have all of the standard online report capabilities when you install the Reporting Plug-In.

For more information about other components in the Inquisite suite of products, visit Inquisite's web site at inquisite.com

Benefits and key features

Convenience and ease of use. Because the Reporting wizard operates in the familiar and widely available environment of Excel and PowerPoint, users have a shorter learning curve. No programming experience is required to use the Reporting wizard.

Speed and productivity. The wizard approach makes creating multiple reports in a limited time period uncomplicated—no cutting and pasting required. Reports are created with live data that can be refreshed through the wizard without having to recreate the format of the report.

Collaboration. Because the Reporting Plug-In is a standalone tool, analysts do not need to have an understanding of the Inquisite software to be able to use the Reporting wizard. Analysts can use the Reporting wizard to analyze survey data without being survey administrators. This promotes shared information throughout the organization.

Visibility and actionable information. For each survey, the Reporting wizard creates multiple Excel worksheets (also called *reports*) in one report workbook and includes a table of contents at the front of the workbook. Collecting survey data in one spot eliminates the need for running several reports and combining the reports manually.

Flexibility and control. Customized reports show only the information you want, the way you want it. Survey data can be filtered by date or by user-defined rules created for questions and answers. Cross-tabulation reports offer formatting, statistical and summary data options.

Insight into customer and employee feedback. With cross-tabulation reports, you have an unlimited ability to segment data with an unlimited number of banner points. Filter options allow you to show the exact data you want to see.

Unicode. Because the Reporting wizard uses Unicode to chart and report all survey data, you can use the tool for surveys in most languages.

2 Installing the Inquisite Reporting Plug-In

Follow the steps in this chapter to install the Reporting Plug-In on a supported Windows machine.

System Requirements

This section explains the requirements for successfully installing the Reporting Plug-In.

Inquisite server requirements

Before installing the Reporting Plug-In, all of the Inquisite server components must be installed and configured. The Reporting Plug-In requires that the Inquisite system is at version 7.5.

Operating system requirements

The Reporting Plug-In is supported on the following operating systems:

- Windows 2000 Professional with Service Pack 3 or higher and Internet Explorer 5.5 or higher
- Windows XP Professional

.NET requirements

If the following components are not yet installed on your machine, the **Setup** program for the Reporting Plug-In automatically installs them. An internet connection is required for **Setup** to download these components.

- .NET Framework 2.0 Redistributable Package
- Shared Add-in Extensibility Update for Microsoft .NET Framework 2.0
- Shared Add-in Support Update for Microsoft .NET Framework 2.0

Supported tools

The Reporting wizard will run on the following versions of Excel and PowerPoint:

- Microsoft Office 2000
- Microsoft Office XP
- Microsoft Office 2003

Installation

You will install the Reporting Plug-In in one of two ways, depending on how you use it. If you create surveys with the Survey Builder, you can optionally install the Reporting Plug-In at the same time that you upgrade the Survey Builder. Installing the Reporting Plug-In as part of a Survey Builder upgrade gives you access to all of Inquisite's tools, including the Survey Builder and online survey administration and reporting tools.

If you are an analyst and use the Reporting Plug-In as a standalone product, you will install it alone. Installing a standalone version of the Reporting Plug-In gives you access also to Inquisite's online survey reporting tool.

For installed customers: Ensure that the Inquisite server components are installed and configured before installing the Reporting Plug-In. For Inquisite 7.5 installation information, see the *Inquisite 7.5 Installation Guide*.

Note: If you are upgrading a previous version of Inquisite to Inquisite 7.5, your survey files—files with the **.iqs** extension—are located in the previous version's directory. To use these survey files with the upgrade, the survey files must be in the same directory as the software. Instead of moving the survey files, consider saving the upgraded Inquisite version into the previous version's directory at upgrade time.

Installing the Reporting Plug-In

Depending on your role, install the Reporting Plug-In in one of the following ways:

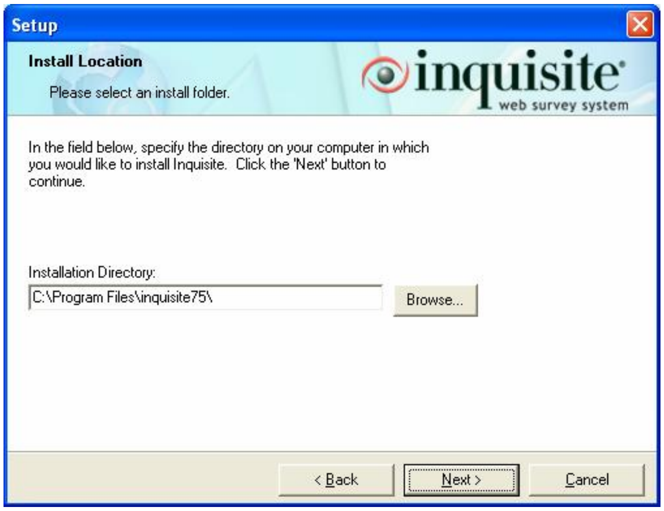
- **Users install the Reporting Plug-In at Survey Builder upgrade time**. The Reporting Plug-In is an optional installation during the download.
- **Analysts install the Reporting Plug-In as a standalone product**. Browse to the designated URL and click **Download Reporting Plug-In**.

To continue with the installation process, follow these steps:

1 You are prompted to begin the Reporting Plug-In installation.

Click **Next**.

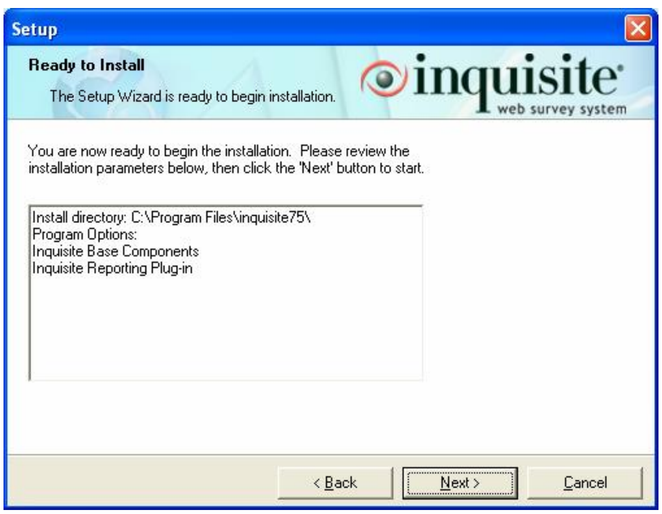
2 **Setup** prompts you to select an installation directory.



Do one of the following:

- To accept the default location, click **Next**.
- To choose a different location, click **Browse** to locate the folder and then **Next**.

3 **Setup** prompts you to confirm the installation folder.



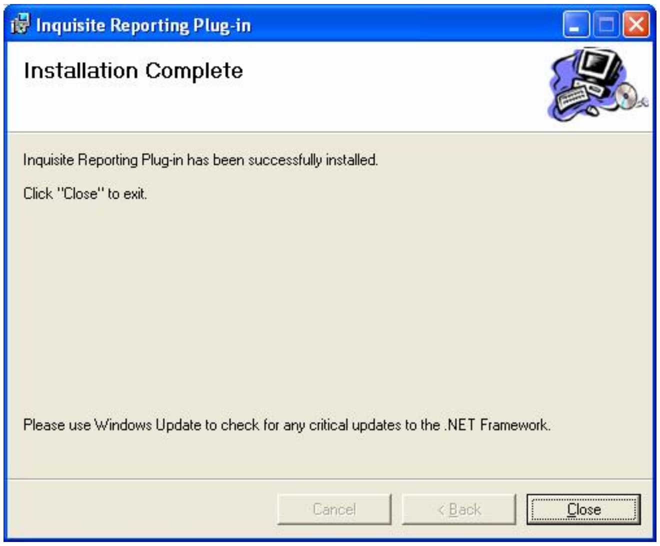
To accept the location of the installed files, click **Next**.

4 **Setup** displays the **Ready to install the Reporting Plug-In** screen when all of the base components are installed. Click **Next**. (If you are installing the Builder only, click **Finish**.)

5 As part of the installation process, **Setup** checks for the correct version of the .NET Framework and all of its components. If the .NET Framework on your system needs to be upgraded, you will be prompted to accept the upgrade. Click **Install**.

6 If your system does not have all of the.NET components required for Inquisite to operate with the Microsoft Office tools, you will be prompted to install them. Click **Install**.

7 **Setup** displays progress of the installation and prompts you when the installation is complete.



Click **Close**.

3 Using the Reporting Wizard

The Reporting wizard lets you create Excel report workbooks and PowerPoint presentations that contain live Inquisite survey data. The multiple reports in Excel are all collected in one Excel report workbook. This Excel workbook includes a table of contents that links to the various reports in the workbook. The charting options available from within Excel are also available to use in new or existing PowerPoint presentations.

This chapter describes some of the procedures you will use when you are working with the Reporting Plug-In, including:

When you create a new report workbook in Excel, you can customize your reports in multiple ways. The following table summarizes display options for a new report workbook in Excel.

QUESTION TYPE	USER-SPECIFIED OPTIONS	REPORT OUTPUT
All question types	**Filtering by**: ▪ Survey questions: include as many or as few questions from the selected survey. ▪ Response state: answered, incomplete and abandoned. ▪ Option to exclude unanswered questions ▪ Date ▪ Response	Defines entire data set for all of the reports in the report workbook.
Single-select and multi-select	**Cross tabulation** of two or more questions. Selecting cross-tabulation questions creates a table that describes the distribution of two or more questions simultaneously.	Cross-tabulation report
	Trending of survey responses over one or more time periods you select.	Cross-tabulation report with trending
	Frequency distribution data: ▪ Counts ▪ Percents ▪ Top and bottom boxes	Cross-tabulation report
	Statistical measurements, with the option to exclude answers with zero weights: ▪ Mean ▪ Median ▪ Standard deviation	Cross-tabulation report Frequency distribution report
	Frequency distribution charts sorted in: ▪ Original display order ▪ Ascending order ▪ Descending order	Frequency distribution charts in a report
	Custom chart or slide templates. Apply a template to both single-select and multi-select questions. Or you can use one template for single-select questions and a different template for multi-select questions.	Excel (or PowerPoint) charts with a custom look and feel
Rank	**Frequency distribution data**. By default, the Reporting wizard collects: ▪ Counts ▪ Percents	Ranking questions report
Open numeric	**Statistical measurements**. The Reporting wizard automatically collects these measures: ▪ Minimum ▪ Maximum ▪ Mean ▪ Median ▪ Mode	Open-ended numeric responses report

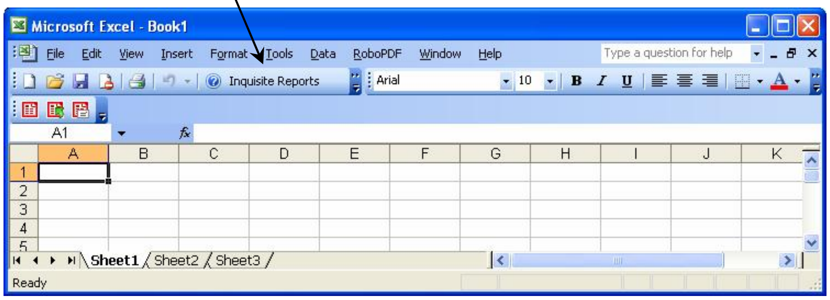
QUESTION TYPE	USER-SPECIFIED OPTIONS	REPORT OUTPUT
Open text	**Listing of open text responses**. The Reporting wizard automatically collects all open-ended text responses and displays them on a separate worksheet. Open-ended text responses include: ▪ Memo (paragraph) ▪ Text ▪ Other (specify)	Open-ended text responses report

Creating a new report workbook in Excel

To create a new Excel report workbook with multiple worksheets (also called *reports*), complete these steps:

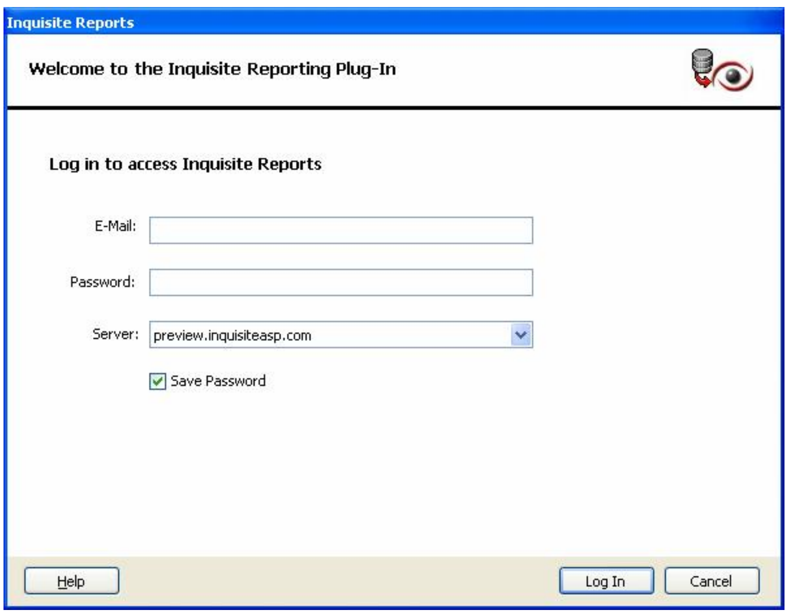
1 Open Excel.

You will see the **Inquisite Reports** button on the Excel toolbar.



2 To launch the Reporting wizard, click **Inquisite Reports**.

3 The **Welcome to the Inquisite Reporting Plug-In** screen is displayed.

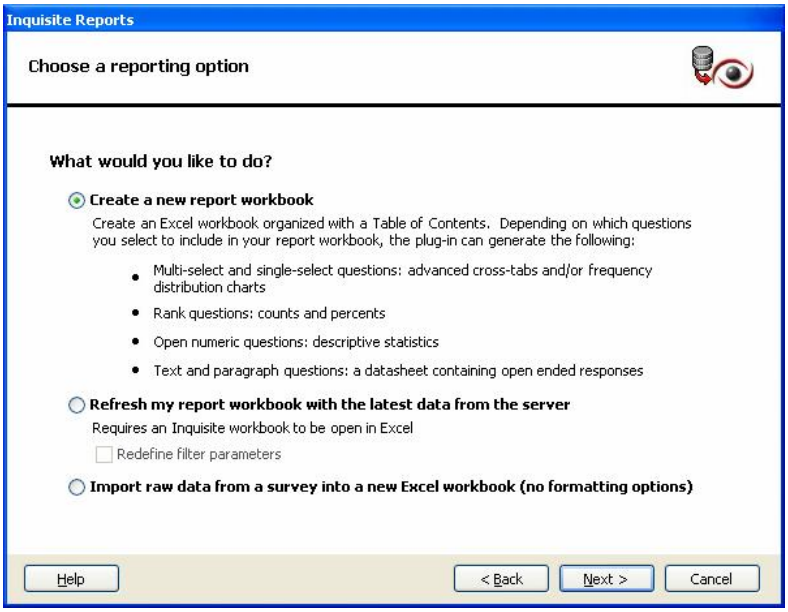


Enter your e-mail address and password.

Depending on your environment, you may see multiple Inquisite servers in the **Server** dropdown list. Select the appropriate server. If your environment includes only one Inquisite server, you will not see the **Server** dropdown list.

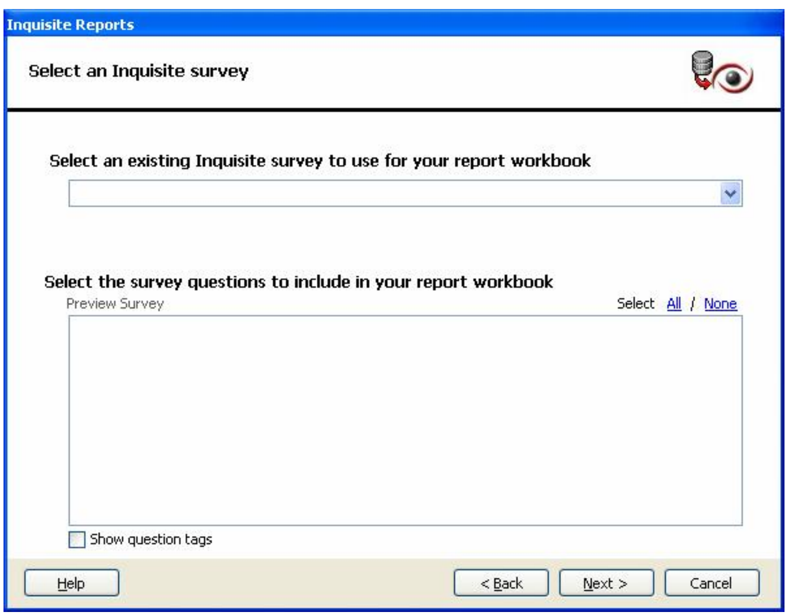
When you have provided all of the correct login information, click **Log In**. This action initiates a session with the Inquisite server.

4 The **Choose a reporting option** screen is displayed.

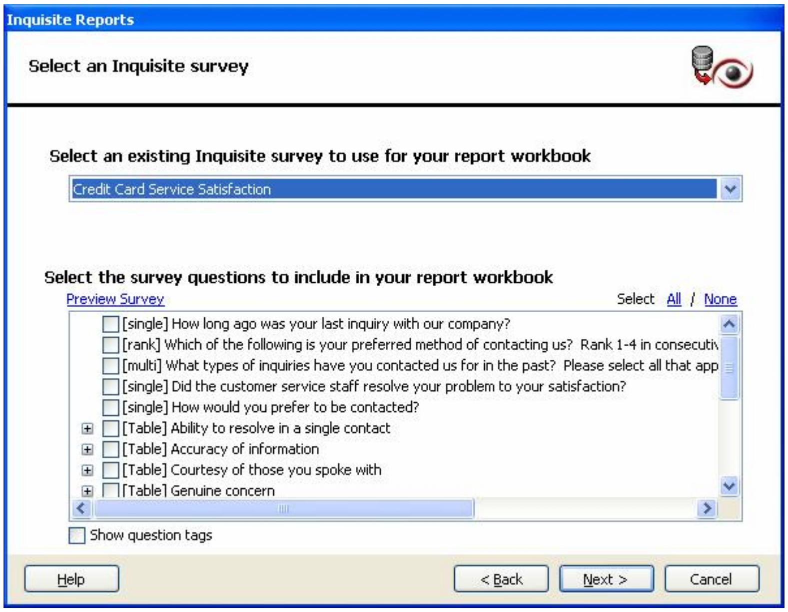


Click **Create a new report workbook** (if it is not already selected) and then **Next**.

5 The **Select an Inquisite survey** screen is displayed. Select a survey from the dropdown list.



6 Survey questions from the selected survey are displayed. Select the survey questions to include in your report workbook. You can click **All** or select individual questions.



To see the survey itself, click the **Preview Survey** link above the questions. If your survey uses question tags and you want to see these displayed next to the questions in this screen, click **Show question tags**.

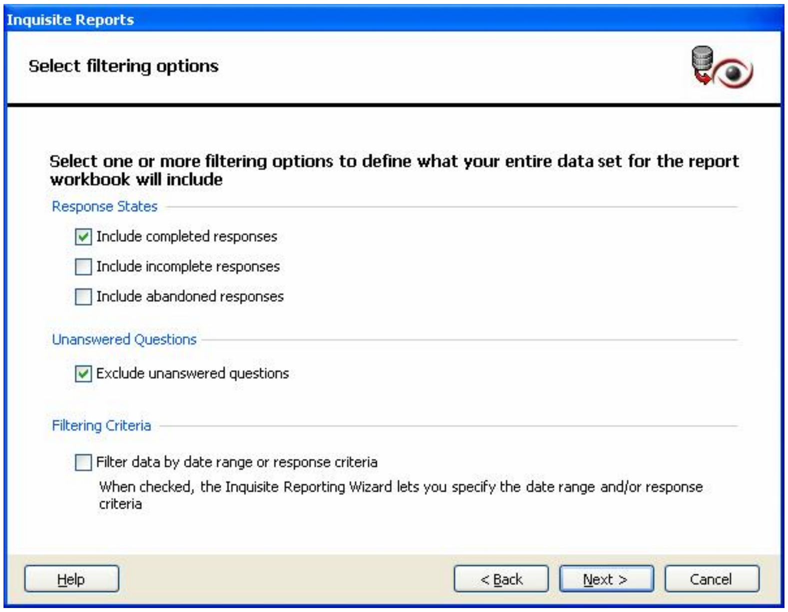
Any questions that were deleted from the survey after the survey was published and activated are displayed in the list with gray shading and noted with **[deleted]** before the question.

When you have selected all of the questions you want to include in the Excel report workbook, click **Next**.

The survey questions you select determine which report options the Reporting wizard makes available. Depending on the survey questions you select, you may not see all of the reporting options. For example, if you do not select any single-select or multi-select questions to include in the report, you will not see options for creating a cross-tabulation report or a chart.

Note: If your survey has over 10,000 respondents and you have included text questions in your report, processing time may increase substantially. To reduce processing time, consider filtering by date range or response criteria. For information about filtering, see step 7.

7 The **Select filtering options** screen is displayed. Use this screen to define the entire data set for the Excel report workbook.



Response States refers to the state of the entire survey and includes these options:

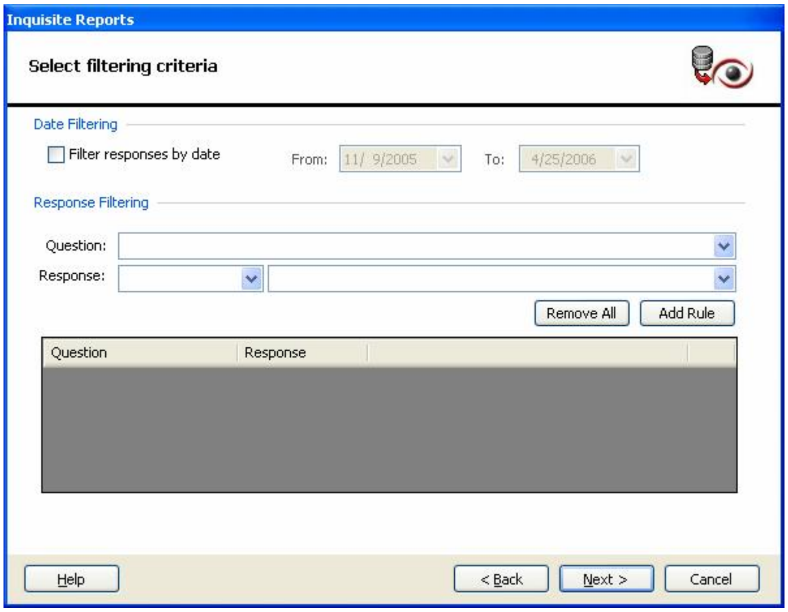
- **Include completed responses** specifies surveys that have been submitted.
- **Include incomplete responses** specifies in-progress surveys that have been saved but have not been submitted.
- **Include abandoned responses** specifies in-progress surveys that have timed out and not been submitted. See also the glossary entry for *abandoned response*.

Unanswered Questions included in your data set may skew the survey results. For example, if your pool of respondents totals 10 and three respondents give the same answer but one person does not answer the question, the result for that answer should be 33% (3/9), not 30% (3/10). To exclude unanswered questions from the report, ensure that **Exclude unanswered questions** is checked.

Filtering Criteria lets you specify additional filters. To filter by dates or responses, click **Filter by date range or response criteria** and then **Next**.

If you do not want to filter by date or response, ensure that **Filter by date range or response criteria** is unchecked. Click **Next** and skip to step 9.

8 If you checked **Filter by date range or response criteria**, the **Select filtering criteria** screen is displayed.



Date Filtering restricts the survey data collected by a date range you specify. To select a date range from which to build the report, click **Filter responses by date** and select the **From** and **To** dates.

Response Filtering also narrows the scope of the report. For example, you can filter on demographic questions to answer a request, such as: "Show only the responses of people in Department XYZ." Use rules to accomplish this.

Note: Response filtering is not available for rank questions.

Question displays a list of all the questions in your survey. Select the question for which you want to add a filtering rule. For example, to see only the response from people in Department XYZ, select the question in which respondents indicated their department.

Response displays an operator (such as **is equal to** or **contains**) in the first dropdown list. The second box displays options appropriate to the question type. For single-select and multi-select questions, this box displays the available answers to the question. For text and numeric questions, the box is blank for you to enter the desired value.

Use the **Question** and **Response** fields in combination to build a new rule. Consider an example to meet the following criterion: show only the answers from respondents who, when asked *Employee Status*, their answer was equal to *hourly*. In the **Question** dropdown list, select **Employee Status**. In the first **Response** dropdown list, select **is equal to**. In the second **Response** dropdown list, select **hourly**.

Clicking **Add Rule** adds the filter rule you constructed with the **Question** and **Response** fields.

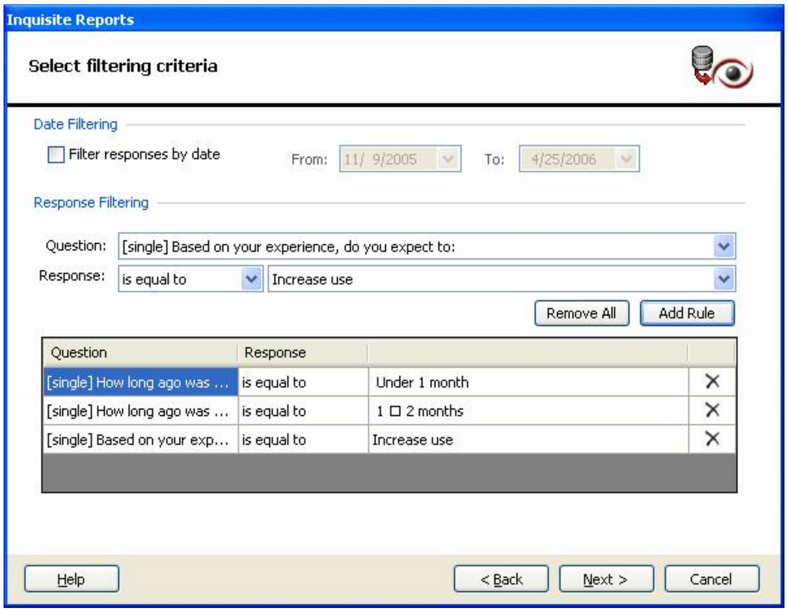
To narrow the scope of the report further, create two or more filter rules. With two (or more) filter rules specified, the Reporting wizard uses the Boolean AND and OR operators to define the survey data that is returned to the report.

If you construct two rules for two separate questions, the Reporting wizard uses the Boolean AND operator to return survey data that fulfills both of the requests. That is, only the answers that fulfill both of the rules are returned to the report.

If you construct two or more rules for the same question, the Reporting wizard uses the Boolean OR operator to return survey data that fulfills either of the requests.

In the following example, three rules are added, two rules for the same question (**How long ago was your last inquiry with the company?**) and one rule for a separate question (**Based on your experience, do you expect to increase use?**). With these filters set, the Reporting wizard will return responses from the following respondents:

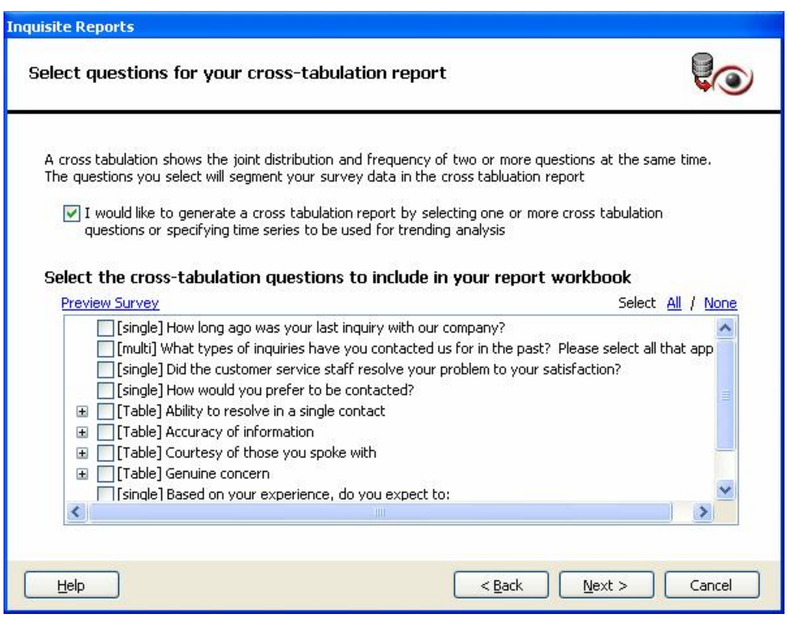
- Respondents who made an inquiry less than a month ago and who intend to increase their use.
- Respondents who made an inquiry one to two months ago and who intend to increase their use.



When you are finished constructing report filters, click **Next**.

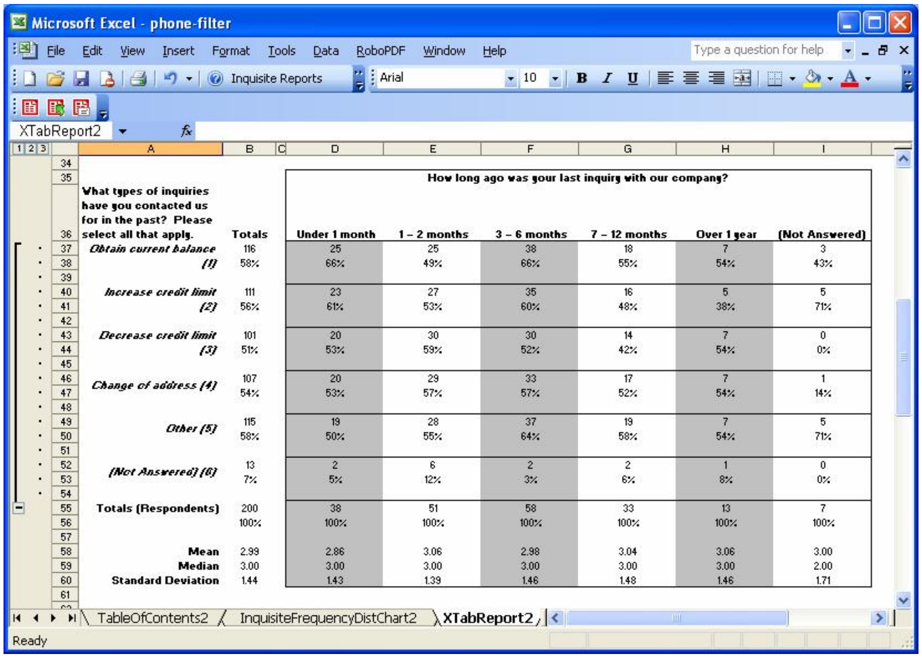
9 The **Select questions for your cross-tabulation report** screen is displayed. To show the joint distribution of two or more questions at the same time, use a cross-tabulation report.

If you do not want to create a cross-tabulation report, uncheck the **I would like to generate a cross-tabulation report…** box and click **Next**. Then, skip to step 12. If you choose not to create a cross-tabulation report, you are still able to define a frequency distribution report. See step 12.



Select the survey questions to include as cross-tabulation questions. These questions will segment your survey data in the Excel cross-tabulation report. To see the survey itself, click **Preview Survey**.

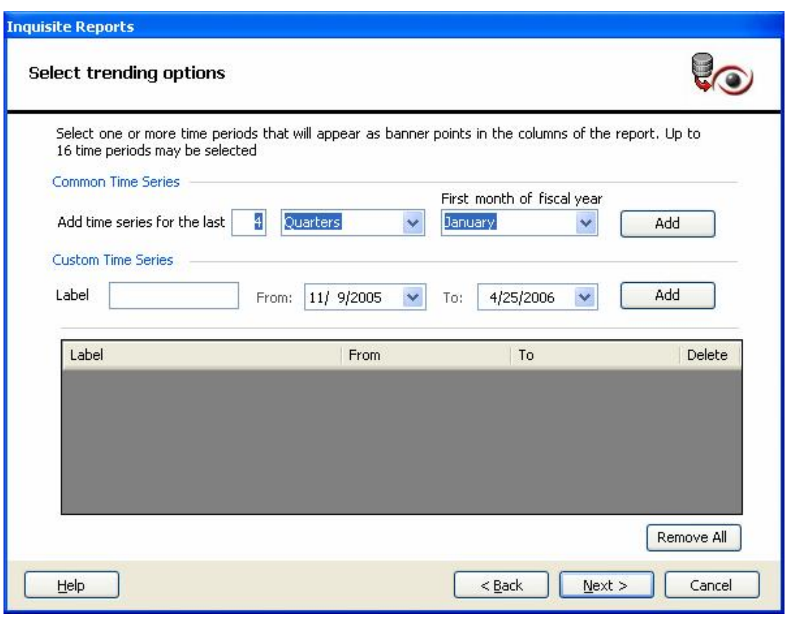
The following example displays a cross-tabulation report. In this section of the report, the responses to the question **What types of inquiries have you contacted us for in the past** are segmented by the responses to the question **How long ago was your last inquiry with our company**.



Note: Avoid selecting all survey questions to serve as cross-tabulation questions. The resulting report may be too wide for practical analysis. Also, Excel's column number limitation (256) may prevent the report from being created.

When you have selected all of the questions you want to use in your cross-tabulation report, click **Next**.

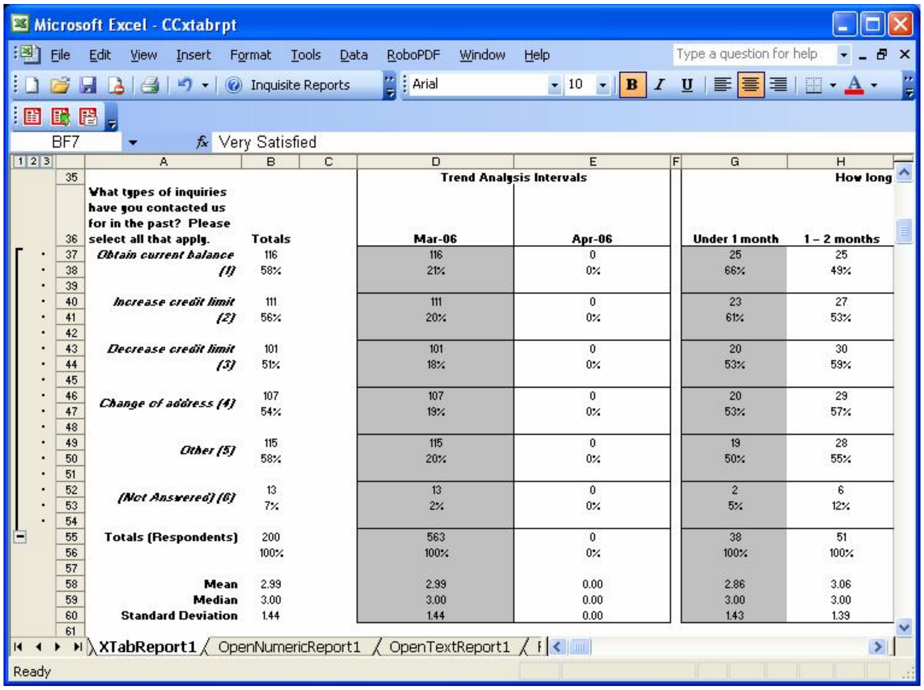
10 The **Select trending options** screen is displayed.



Trending is another way of creating banner points in your report. A banner point is a column in a cross-tabulation report that segments the data in the same way that a cross-tabulation question does.

Applying trending to cross-tabulation questions helps you analyze survey responses over a time period you specify. These time periods appear as banner points in the report columns.

The following example displays the cross-tabulation report with trending:

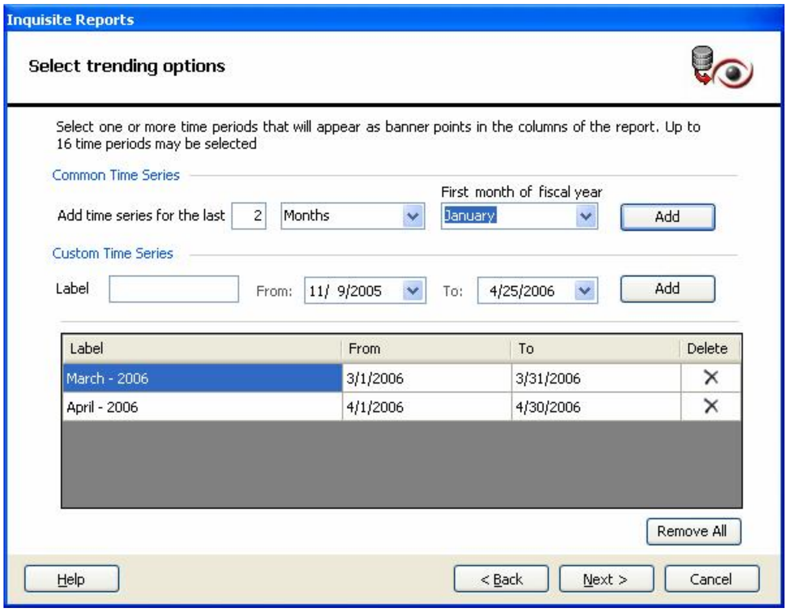


What types of inquiries have you contacted us for in the past? Please select all that apply.	Totals	Mar-06	Apr-06	Under 1 month	1 – 2 months
Obtain current balance (1)	116 58%	116 21%	0 0%	25 66%	25 49%
Increase credit limit (2)	111 56%	111 20%	0 0%	23 61%	27 53%
Decrease credit limit (3)	101 51%	101 18%	0 0%	20 53%	30 59%
Change of address (4)	107 54%	107 19%	0 0%	20 53%	29 57%
Other (5)	115 58%	115 20%	0 0%	19 50%	28 55%
(Not Answered) (6)	13 7%	13 2%	0 0%	2 5%	6 12%
Totals (Respondents)	200 100%	563 100%	0 0%	38 100%	51 100%
Mean	2.99	2.99	0.00	2.86	3.06
Median	3.00	3.00	0.00	3.00	3.00
Standard Deviation	1.44	1.44	0.00	1.43	1.39

To specify a common time series, enter the number of years, quarters, months, weeks or days in the **Add time series for the last** box. Then select **Years**, **Quarters**, **Months**, **Weeks**, or **Days** from the dropdown list. When you select **Quarters** or **Years**, select the **First month of fiscal year**. When finished, click **Add**.

To specify a custom time series, such as year-to-date or month-to-date or specified consecutive months, enter a descriptive label (such as YTD) in the **Label** field, select **From** and **To** dates and click **Add**.

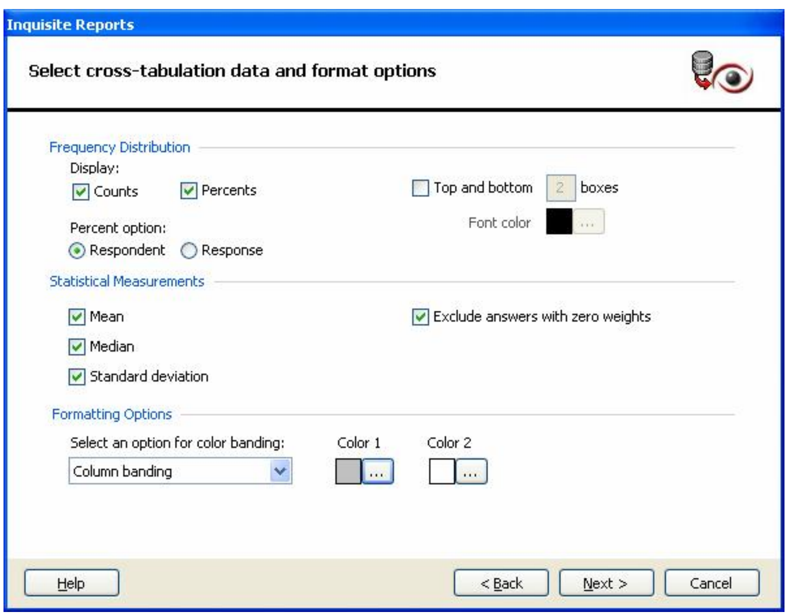
In the following example, trending options are specified for the last two months:



You can add multiple time series. To delete a time series, click the **X** in the **Delete** column for the time series. To delete all of the time series, click **Remove All**. To change a label after you have added the time series, select the text in the **Label** column, and type the desired label.

When finished, click **Next**.

11 If you are creating a cross-tabulation report, the **Select cross-tabulation data and format options** screen is displayed. Use this screen to specify frequency distribution and statistical measurements to include in the report. For cross-tabulation reports, you can also specify colors for columns, rows, headers and footers.



Counts displays a count of how often a respondent chose the answer.

Percents displays what percentage of the total available answers the count represents.

Percent option defines the denominator value (number of respondents or number of responses) for calculating percentages in frequency distribution reports. To display the percentage of respondents, click **Respondent**; to display the percentage of responses, click **Response**. See also the glossary definition for *percent option*.

Top and bottom boxes displays the count and percent for the specified number of top and bottom responses to single-select questions.

This measure is relevant for scale questions. For example, you can use this measure to report on satisfaction questions.

Consider this scenario: a survey includes a scale question that measures satisfaction with the responses—Strongly Agree, Agree, Neutral, Disagree and Strongly Disagree. Because respondents are often less likely to choose the top and bottom of a scale, reporting on the top two and bottom two answers to this question may more accurately represent the survey results.

Specifying the number of top and bottom boxes will also shade the top ranked responses in the ranking questions report.

Check **Top and bottom** and enter the desired number of top and bottom boxes. Typically, you will enter 2 for 5-point scale questions and 3 for 7-point scale questions.

Statistical Measurements include the following for weighted or scale questions. Note that even if your survey questions were not created with weights applied to the responses, the Inquisite survey software applies ordinal values to the responses.

- **Mean** reports the average, or the sum of all data divided by the number of data points.
- **Median** reports data point in the middle of the distribution.
- **Standard deviation** displays the average difference between the values of the data in the set, or how spread out the values are.
- **Exclude answers with zero weights** is useful to be able to correctly describe the group of respondents. Examples of zero-weight responses include N/A, Don't Know or Undecided. Including these responses when calculating statistical measurements can skew the survey results.

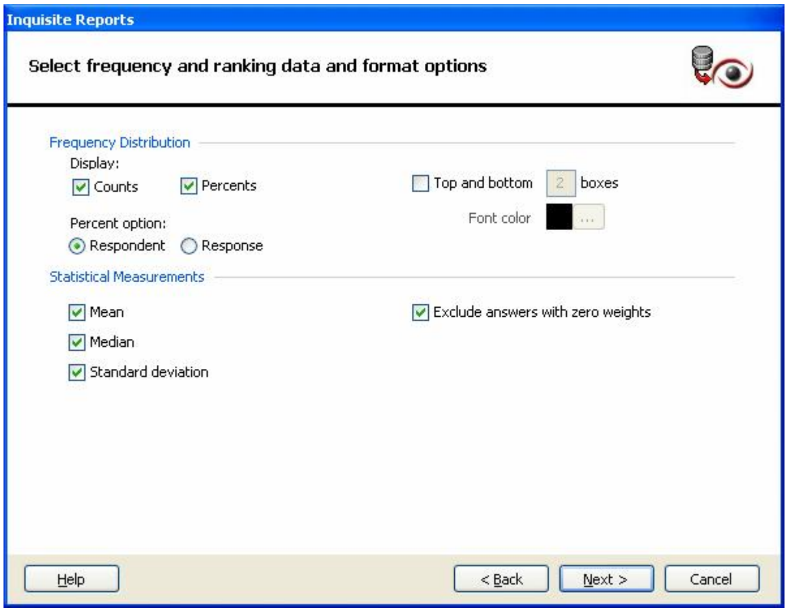
Note: For open numeric survey questions, the minimum, maximum, median, mode and mean are automatically calculated and displayed on a separate Excel worksheet.

Formatting Options available for cross-tabulation reports include:

- **Column banding** specifies colors for alternating columns.
- **Row banding** specifies colors for alternating rows and for the report header and footer.

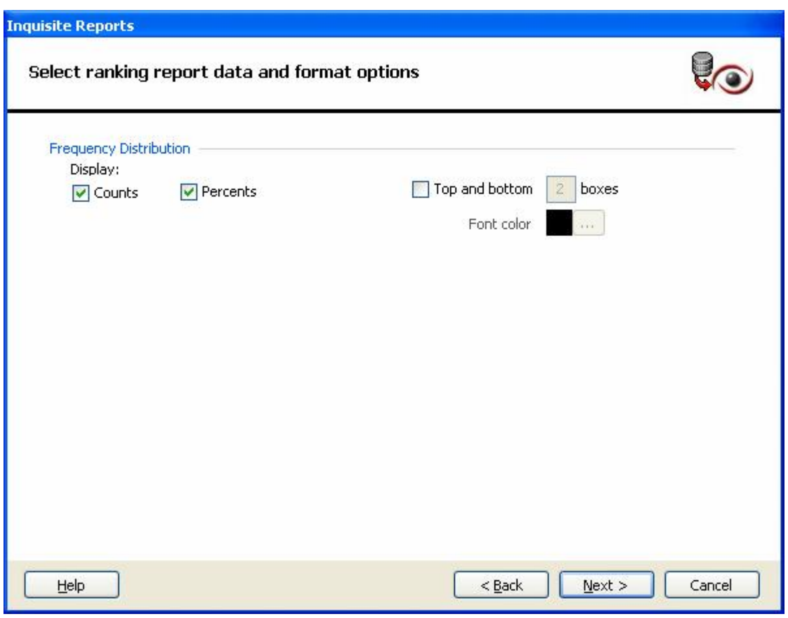
When finished, click **Next** and skip to step 14.

12 If you deselected the cross-tabulation report option in step 9, the **Select frequency and ranking data and format options** screen is displayed. Note that this screen includes all of the same options as the **Select cross-tabulation data and format options** screen except for color banding.



For descriptions of the options in this screen, see the previous step. When finished, click **Next** and skip to step 14.

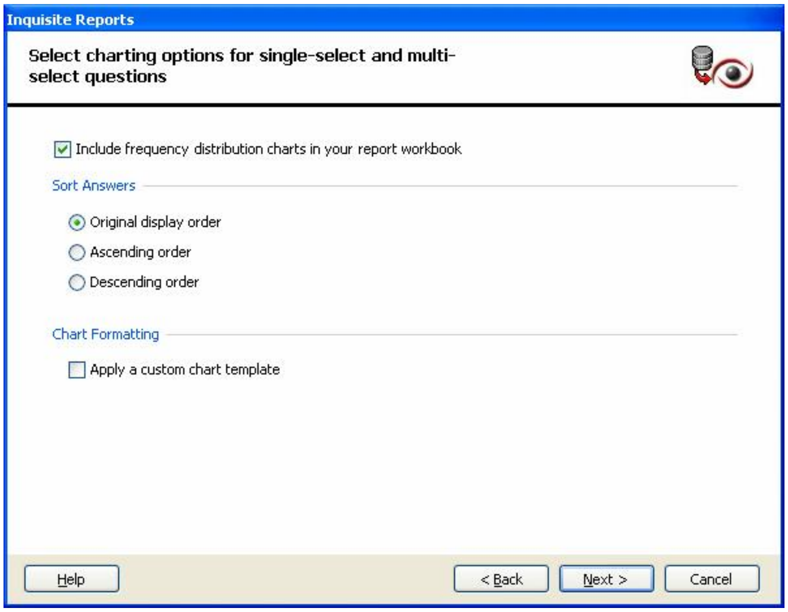
13 If you selected only rank questions for your report, you will see the **Select ranking report data and format options** screen. Use this screen to specify frequency distribution measurements to include in the report.



Note: Specifying the number of top and bottom boxes adds shading to the top ranked responses in the ranking questions report.

For descriptions of the options in this screen, see step 11. When finished, click **Next**.

14 The **Select charting options for single-select and multi-select questions** screen is displayed. Use this screen to specify how charts are formatted for single-select and multi-select questions. To turn this charting option off, deselect **Include frequency distribution charts in your report workbook**, click **Next** and skip to step 16.



Sort Answers include the following options for ordering the data:

- **Original display order** displays the question responses in the order in which the questions were presented in the survey. For some scale questions, such as satisfaction scales (Satisfied to Dissatisfied), consider using the original display order when you set up the chart.
- **Ascending order** displays the question responses in ascending order. This option may be useful to read the results of multi-select questions.
- **Descending order** displays the question responses in descending order. This option may be useful to read the results of multi-select questions.

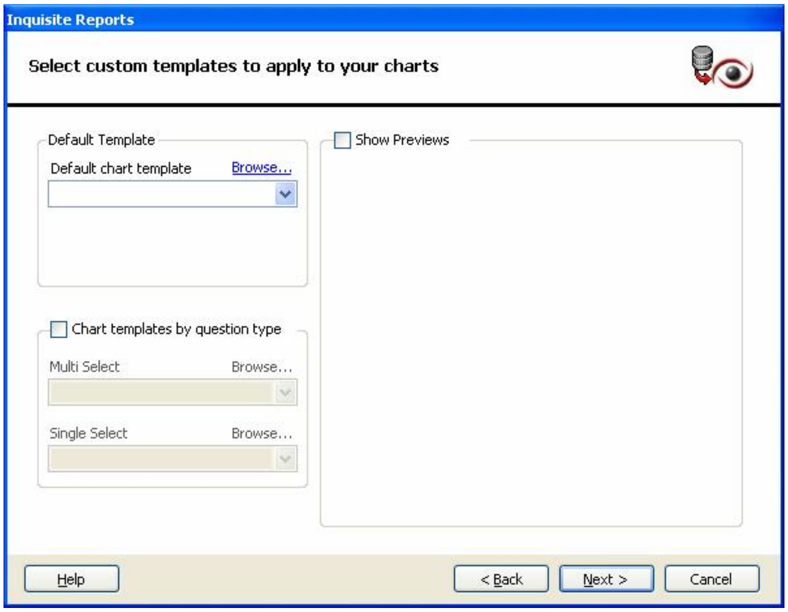
Tip: To generate meaningful charts for multiple question types that require different display orders, consider running the Reporting wizard separately for each question type.

To use a custom chart template for single-select and multi-select questions, check **Apply a custom chart template**. If you do not want to use a custom chart template, click **Next** and skip to step 16.

When finished click **Next**.

15 If you checked **Apply a custom chart template**, you will see the **Select custom templates to apply to your charts** screen. Use this screen to apply a custom template to charts created for single-select and multi-select questions. If you don't select a **Default Template**, the Reporting wizard uses Excel's default chart template.

To learn how to create a chart template (.xlt file) in Excel, see page 51.



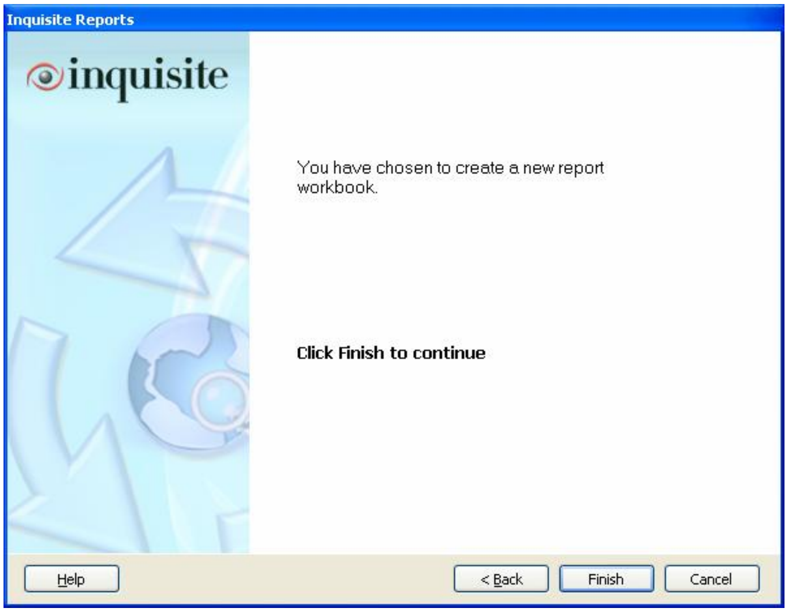
To select a **Default Template**, select the template name from the **Default chart template** dropdown list.

If you don't see your template in the dropdown list, click **Browse** to locate it.

To select a template for each question type, check **Chart templates by question type**. Then, select a template name for one or both question types: **Multi-Select** and **Single-Select**. If you select a template for only one question type, the Reporting wizard will use the **Default Template** for the other question type.

When finished, click **Next**.

16 When the Reporting wizard has collected all of the instructions for creating the report, you are prompted to continue. Click **Finish**.



The Reporting wizard creates the reports in a new Excel workbook. Depending on the number of responses and answer types (open-ended text responses, for example) in the survey you selected, the Reporting wizard may require a few minutes to complete. During this processing time, the instance of Excel will be unavailable. To use Excel while the Reporting wizard is processing, launch Excel again to start another instance.

Note: If you copy and paste live Inquisite data from one Excel spreadsheet to another, you will not be able to refresh the workbook with updated Inquisite survey data.

Refreshing an existing Excel report workbook

Before you refresh your report workbook, consider the following:

- Refreshing a report workbook with updated Inquisite survey data does not update survey questions in the report workbook. That is, if you make changes to the survey after creating a new report workbook and then refresh the report workbook, these changes will not be included in the refreshed report. If the survey questions change after you create the report workbook, consider creating a new report workbook.
- The refresh process does not save formatting changes to the text report. If you format a text report in a report workbook and then refresh the report workbook, the Reporting wizard overwrites the previously formatted text report.

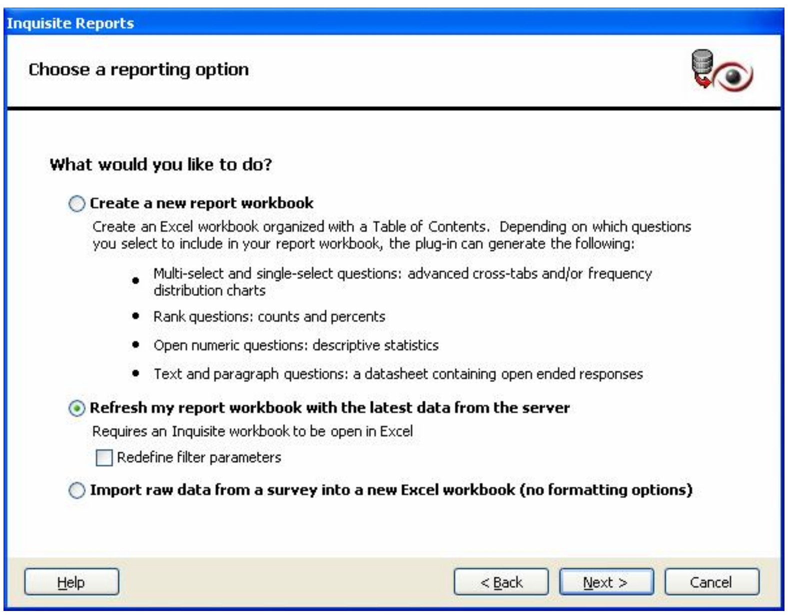
To refresh an existing Excel report workbook with updated Inquisite survey data, complete these steps:

1 Open the Excel report workbook that you want to update and click **Inquisite Reports** from the Excel toolbar.

2 From the **Welcome to the Inquisite Reporting Plug-In** screen, enter your e-mail address and password. If your environment includes more than one Inquisite server, you will see the **Server** dropdown list. Select an Inquisite server from the **Server** dropdown. When finished, click **Log In**.

3 The **Choose a reporting option** screen is displayed.

Click **Refresh my report workbook with the latest data from the server**.

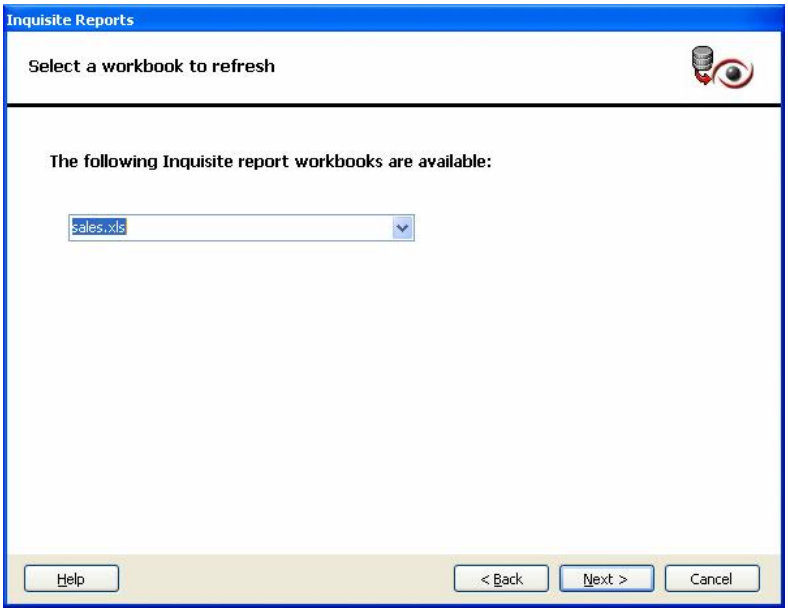


To change the filters that were applied to the previous report—including selecting a new date range and filtering questions—check **Redefine filter parameters**.

If you do not want to change the filters from the previous report ensure that **Redefine filter parameters** is unchecked.

When finished, click **Next**.

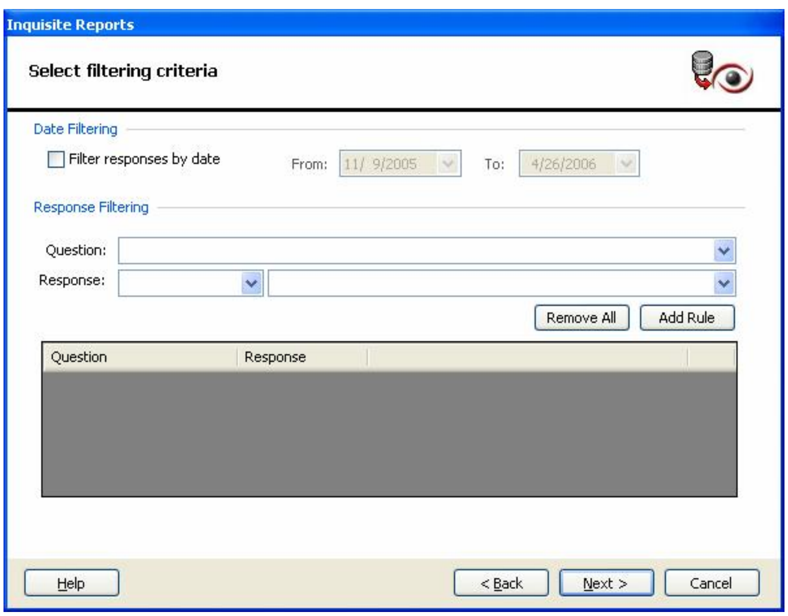
4 The **Select a workbook to refresh** screen is displayed.



Select the report workbook you want to update from the dropdown list and click **Next**. If you do not see the report workbook in the dropdown list, ensure it is opened in Excel.

If you did not check **Redefine filter parameters** in step 3, skip to step 6.

5 If you selected **Redefine filter parameters**, you are prompted to select filtering criteria.



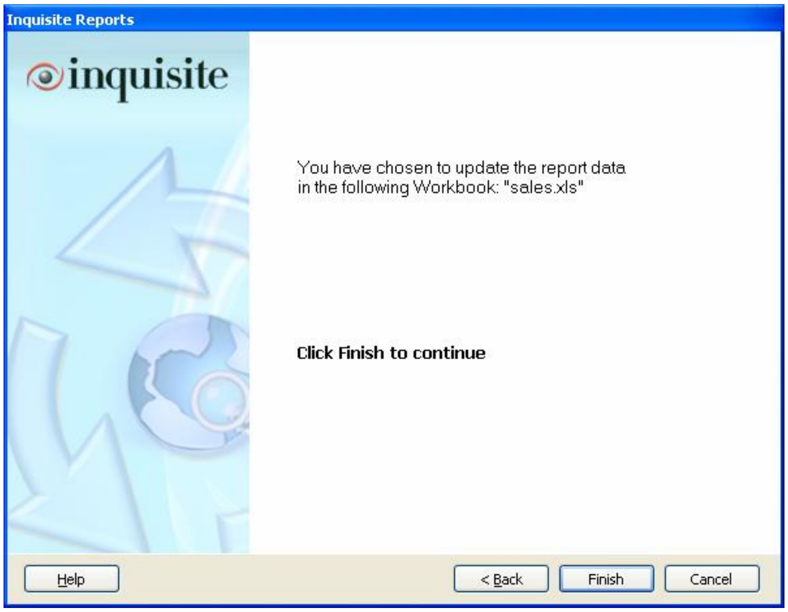
To select a date range from which to update the report, click **Filter responses by date** and select the **From** and **To** dates.

If you set up response rules in the original report, you will see these in the **Response Filtering** box. You can delete one or more of the response rules or change the label. You can also add new response rules.

For more information about response rules, see page 20.

When finished, click **Next**.

6 You are prompted to continue with the refresh process. Click **Finish**.



The Reporting wizard updates the existing Excel report workbook with new survey data from the Inquisite server.

Importing survey data into a new Excel report workbook

Note: Rank questions are not imported into an unformatted Excel report workbook.

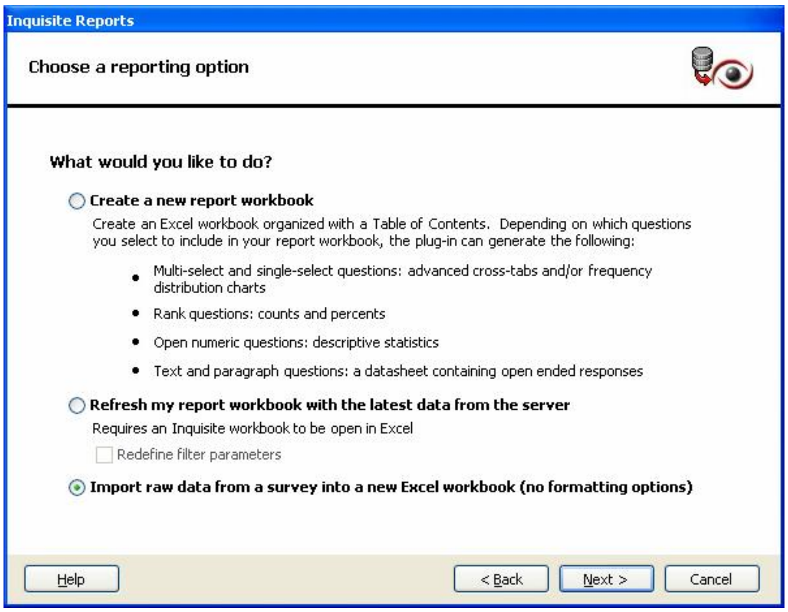
To import survey data into a new Excel report workbook (without formatting the data), complete these steps:

1 Open Excel and click **Inquisite Reports** from the Excel toolbar.

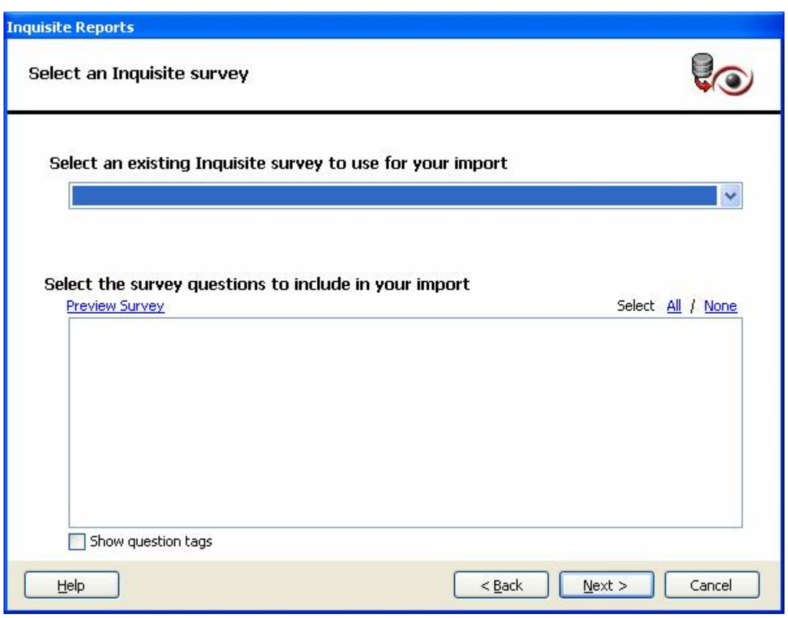
2 From the **Welcome to the Inquisite Reporting Plug-In** screen, enter your e-mail address and password. If your environment includes more than one Inquisite server, you will see the **Server** dropdown list. Select an Inquisite server from the **Server** dropdown. When finished, click **Log In**.

3 The **Choose a reporting option** screen is displayed.

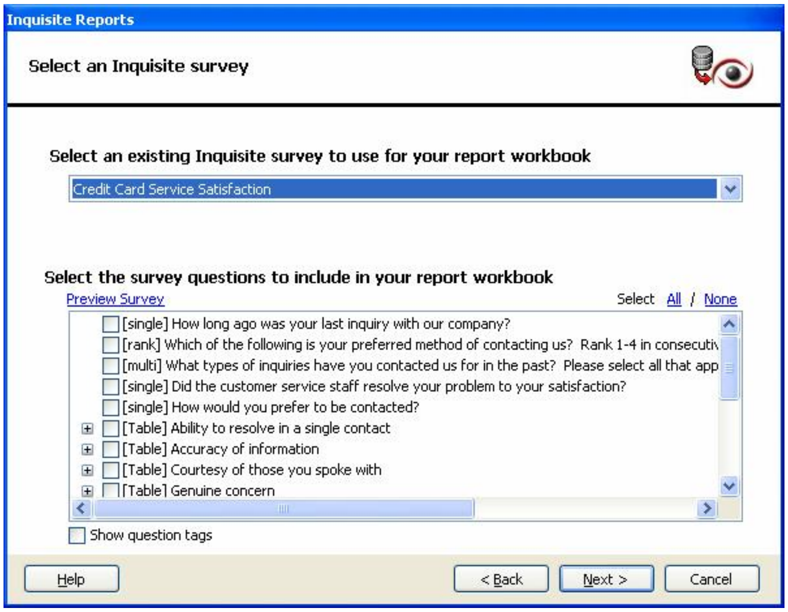
Click **Import raw data from a survey into a new Excel workbook** and then **Next**.



4 From the **Select an Inquisite survey** screen, select a survey from the dropdown list.

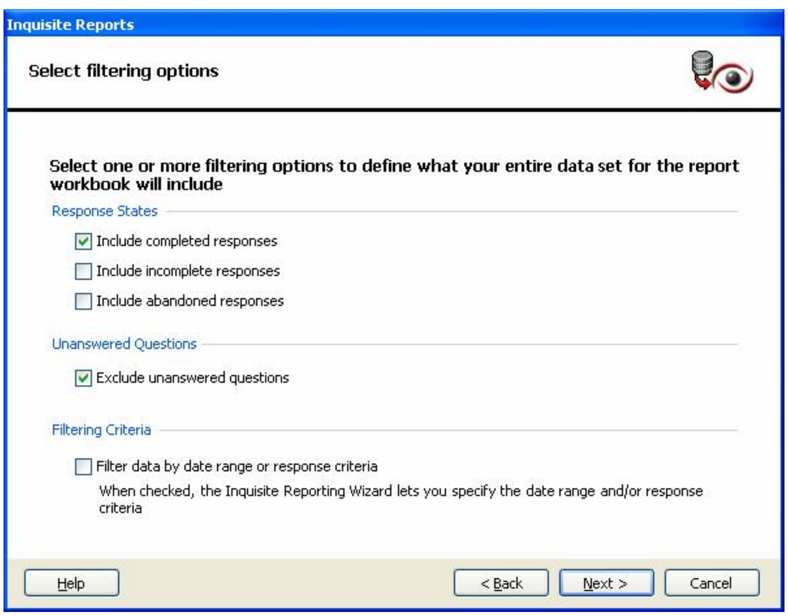


5 Questions from survey are displayed.



Select the survey questions to include in your report workbook. You can click **All** or select individual questions. When finished, click **Next**.

6 The **Select filtering options** screen is displayed. Use this screen to define the entire data set for the Excel report.

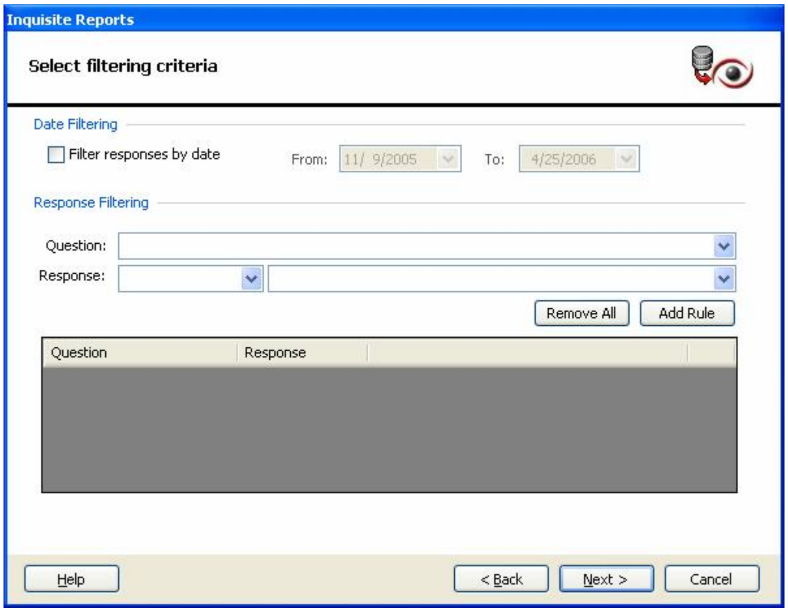


For more information about the settings in this screen, see the description on page 19.

If you do not want to filter by date or response, ensure that **Filter by date range or response criteria** is unchecked. Click **Next** and skip to step 8.

When finished, click **Next**.

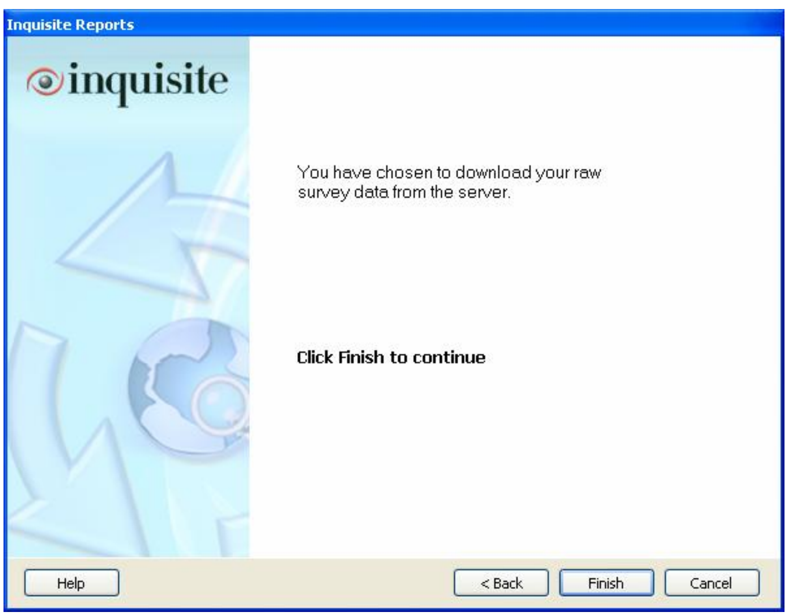
7 If you checked **Filter by date range or response criteria**, the **Select filtering criteria** screen is displayed.



For more information about the settings in this screen, see the description on page 20.

When finished, click **Next**.

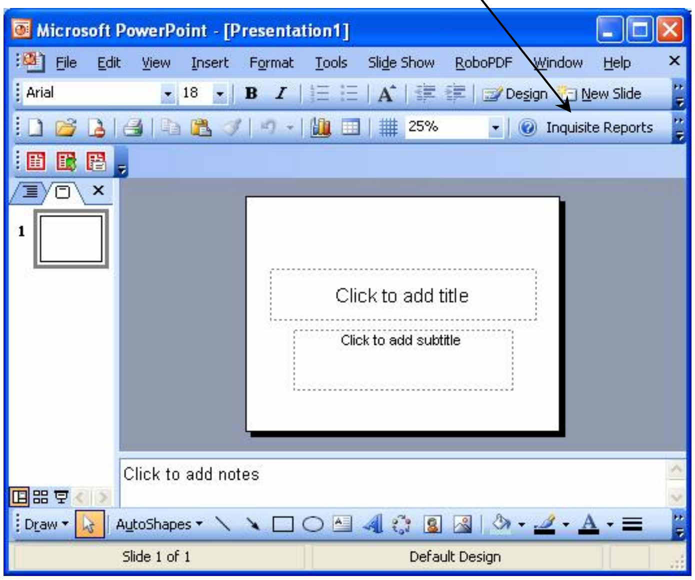
8 When the Reporting wizard has collected all of the instructions for importing the data, you are prompted to continue with the import process. To create the new Excel report, click **Finish**.



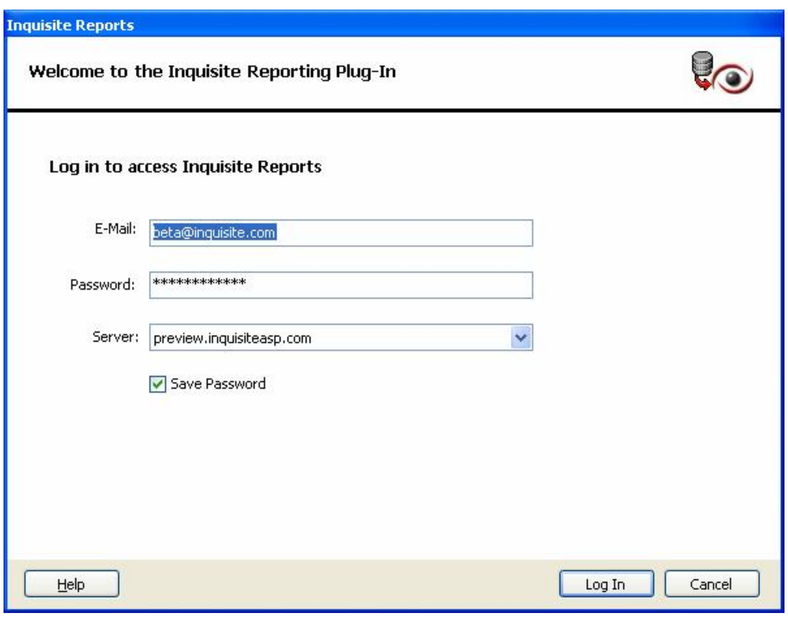
Creating a new presentation in PowerPoint

To create a new PowerPoint presentation with one or more Inquisite survey data charts (for single-select and multi-select questions), complete these steps:

1 Open PowerPoint and click **Inquisite Reports** from the PowerPoint toolbar.



2 The **Welcome to the Inquisite Reporting Plug-In** screen is displayed.

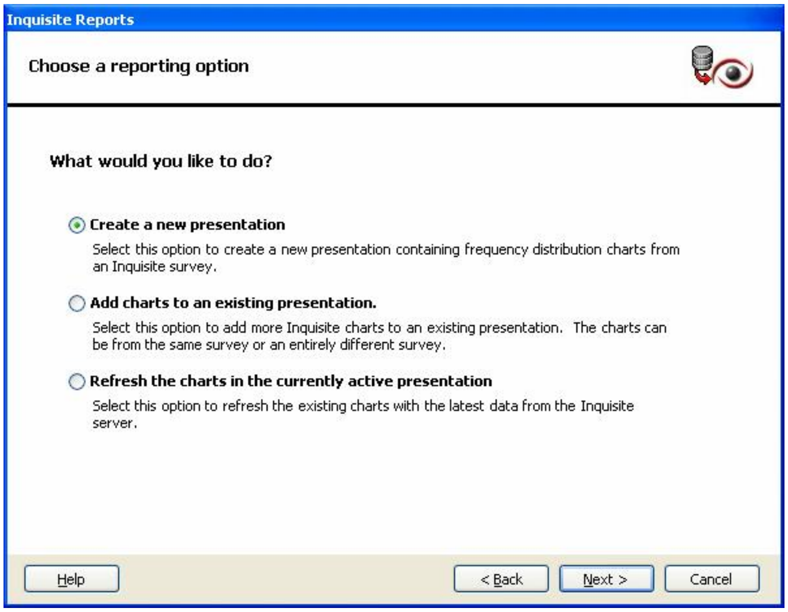


Enter your e-mail address and password.

Depending on your environment, you may see multiple Inquisite servers in the **Server** dropdown list. Select the appropriate server. If your environment includes only one Inquisite server, you will not see the **Server** dropdown list.

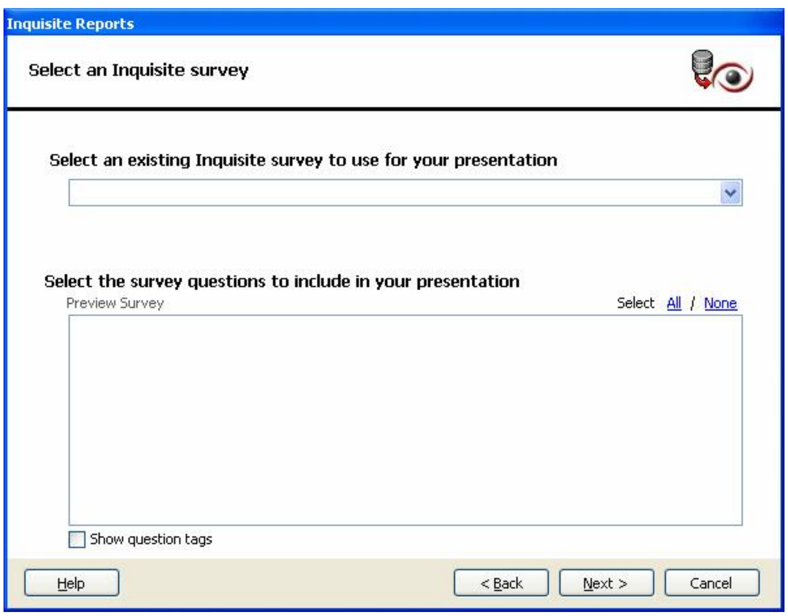
When you have provided all of the correct login information, click **Log In**. This action initiates a session with the Inquisite server.

3 You are prompted to choose a reporting option.

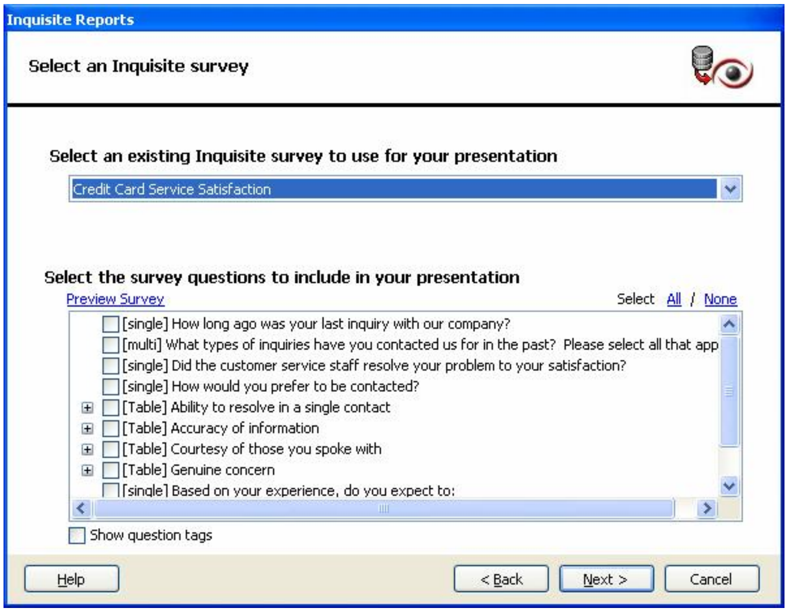


Click **Create a new presentation** (if it's not already selected) and then **Next**.

4 The **Select an Inquisite survey** screen is displayed. Select a survey from the dropdown list.



5 Single-select and multi-select survey questions from the survey are displayed. Select the survey questions to include in your PowerPoint presentation. You can click **All** or select individual questions.

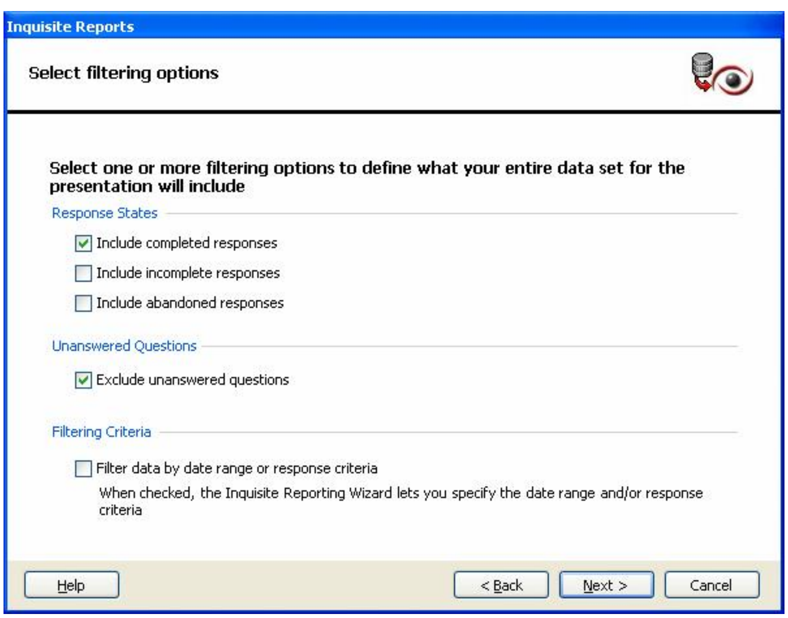


To see the entire survey (including any rank, numeric and text questions), click the **Preview Survey** link above the questions. If your survey uses question tags and you want to see these displayed next to the questions in this screen, click **Show question tags**.

Any questions that were deleted from the survey after the survey was published and activated are displayed in the list with gray shading and noted with **[deleted]** before the question.

When you have selected all of the questions you want to include in the PowerPoint presentation, click **Next**.

6 The **Select filtering options** screen is displayed. Use this screen to define the entire data set for the PowerPoint presentation.



Response States refers to the state of the entire survey and includes these options:

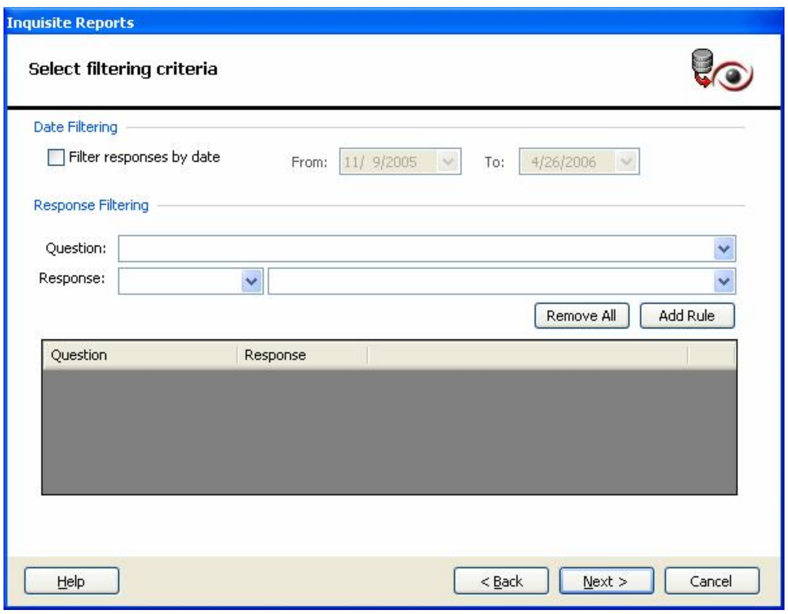
- **Include completed responses** specifies surveys that have been submitted.
- **Include incomplete responses** specifies in-progress surveys that have been saved but have not been submitted.
- **Include abandoned responses** specifies in-progress surveys that have timed out and not been submitted. See also the glossary entry for *abandoned response*.

Unanswered Questions included in your data set may skew the survey results. For example, if your pool of respondents totals 10 and three respondents give the same answer but one person does not answer the question, the result for that answer should be 33% (3/9), not 30% (3/10). To exclude unanswered questions from the report, ensure that **Exclude unanswered questions** is checked.

Filtering Criteria lets you specify additional filters. To filter by dates or responses, click **Filter by date range or response criteria** and then **Next**.

If you do not want to filter by date or response, ensure that **Filter by date range or response criteria** is unchecked. Click **Next** and skip to step 8.

7 If you checked **Filter by date range or response criteria**, the **Select filtering criteria** screen is displayed.



Date Filtering restricts the survey data collected by a date range you specify. To select a date range from which to build the report, click **Filter responses by date** and select the **From** and **To** dates.

Response Filtering also narrows the scope of the report. For example, you can filter on demographic questions to answer a request, such as: “Show only the responses of people in Department XYZ.” Use rules to accomplish this.

Question displays a list of all the questions in your survey. Select the question for which you want to add a filtering rule. For example, to see only the response from people in Department XYZ, select the question in which respondents indicated their department.

Response displays an operator (such as **is equal to** or **is not equal to**) in the first dropdown list. The second box displays options appropriate to the question type. For single-select and multi-select questions, this box displays the available answers to the question. For text and numeric questions, the box is blank for you to enter the desired value.

Use the **Question** and **Response** fields in combination to build a new rule. Consider an example to meet the following criterion: show only the answers from respondents who, when asked *Employee Status*, their answer was equal to *hourly*. In the **Question** dropdown list, select **Employee Status**. In the first **Response** dropdown list, select **is equal to**. In the second **Response** dropdown list, select **hourly**.

Clicking **Add Rule** adds the filter rule you constructed with the **Question** and **Response** fields.

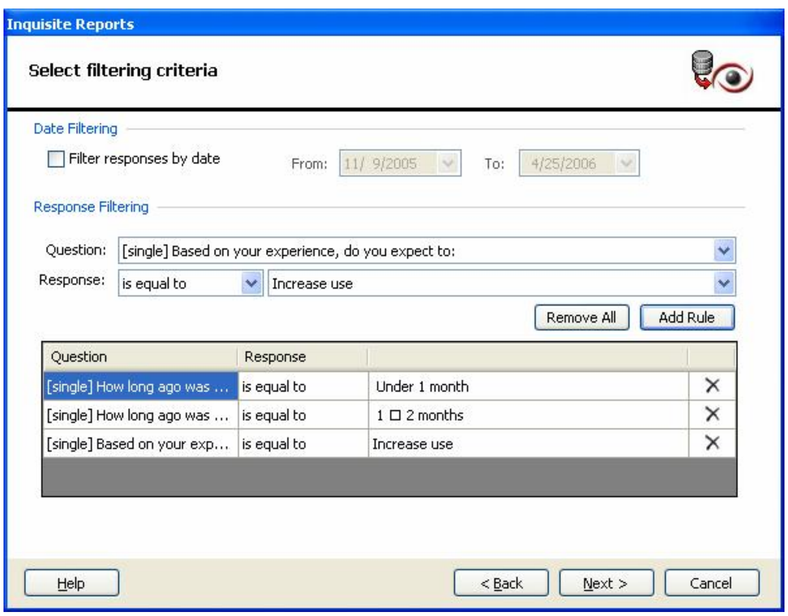
To narrow the scope of the report further, create two or more filter rules. With two (or more) filter rules specified, the Reporting wizard uses the Boolean AND and OR operators to define the survey data that is returned to the report.

If you construct two rules for two separate questions, the Reporting wizard uses the Boolean AND operator to return survey data that fulfills both of the requests. That is, only the answers that fulfill both of the rules are returned to the report.

If you construct two or more rules for the same question, the Reporting wizard uses the Boolean OR operator to return survey data that fulfills either of the requests.

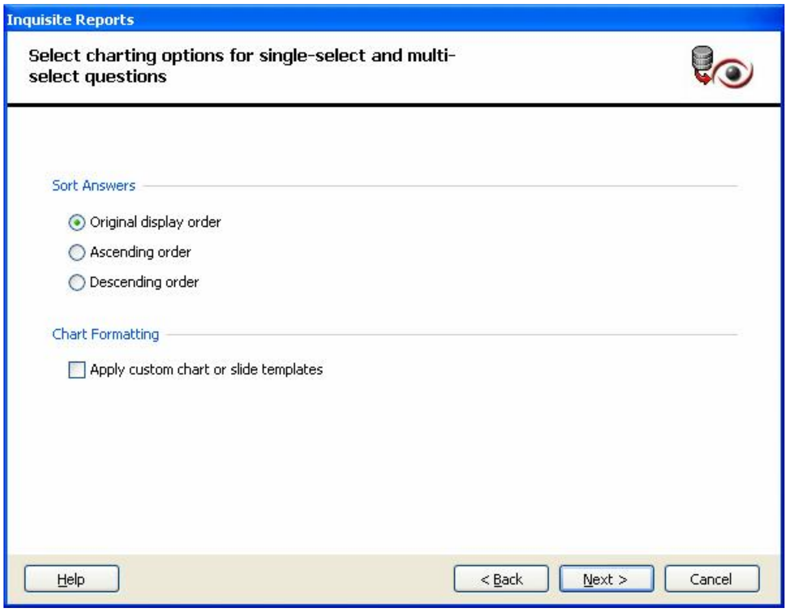
In the following example, three rules are added, two rules for the same question (**How long ago was your last inquiry with the company?**) and one rule for a separate question (**Based on your experience, do you expect to increase use?**). With these filters set, the Reporting wizard will return responses from the following respondents:

- Respondents who made an inquiry less than a month ago and who intend to increase their use.
- Respondents who made an inquiry one to two months ago and who intend to increase their use.



When you are finished constructing the report filters, click **Next**.

8 The **Select charting options for single-select and multi-select questions** screen is displayed. Use this screen to specify how charts are formatted for single-select and multi-select questions.



Sort Answers include the following options for ordering the data:

- **Original display order** displays the question responses in the order in which the questions were presented in the survey. For some scale questions, such as satisfaction scales (Satisfied to Dissatisfied), consider using the original display order when you set up the chart.
- **Ascending order** displays the question responses in ascending order. This option may be useful to read the results of multi-select questions.
- **Descending order** displays the question responses in descending order. This option may be useful to read the results of multi-select questions.

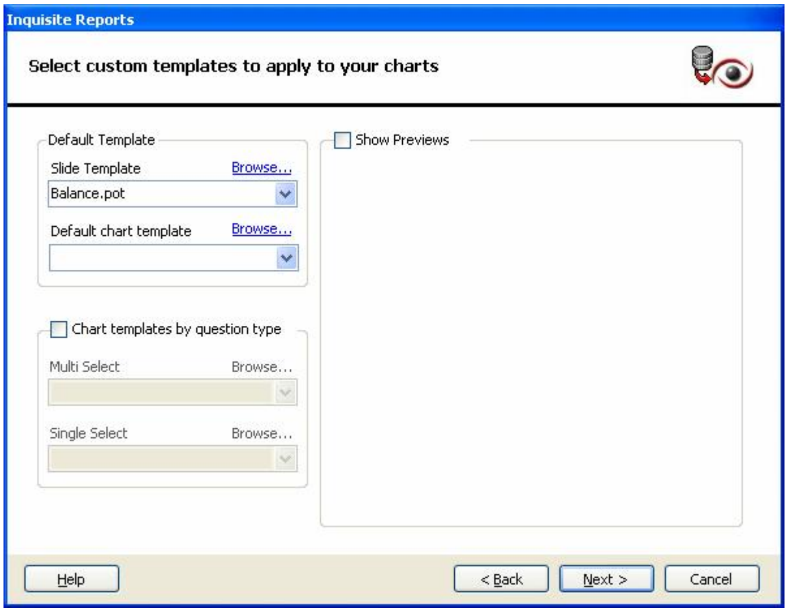
Tip: To generate meaningful charts for multiple question types that require different display orders, consider running the Reporting wizard separately for each question type.

To use a custom chart or slide template for single-select and multi-select questions, check **Apply custom chart or slide templates**. If you do not want to use a custom chart or slide template, click **Next** and skip to step 10.

When finished, click **Next**.

9 If you checked **Apply custom chart or slide templates**, you will see the **Select custom templates to apply to your charts** screen. Use this screen to apply a custom template—yours or any template from PowerPoint—to slides and to charts created for single-select and multi-select questions. If you don't select a **Default Template** for slides or charts, the Reporting wizard uses PowerPoint's default slide and chart templates.

To learn how to create a master slide template (.pot file) in PowerPoint, see page 51.



To select a **Default Template** for slides, select the template name from the **Slide template** dropdown list.

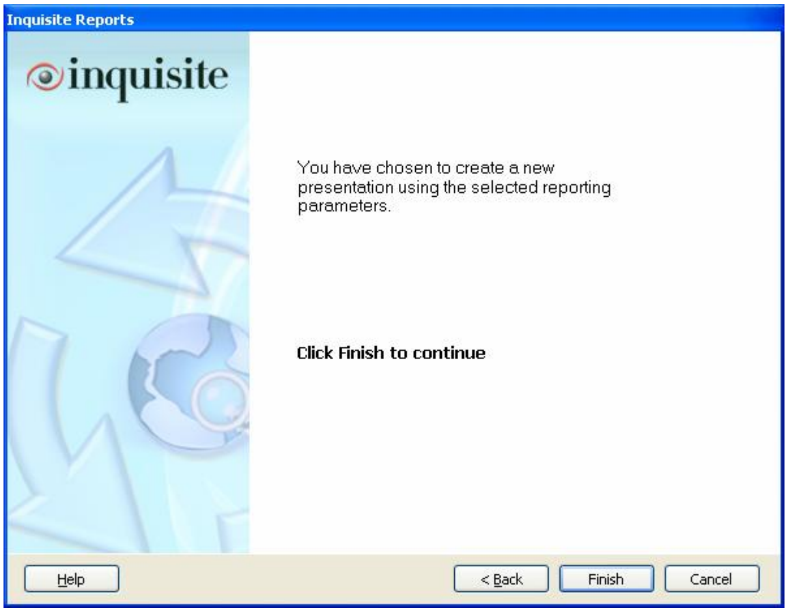
Note: If you don't see your template in a dropdown list, click **Browse** to locate it.

To select a **Default Template** for charts, select the template name from the **Default chart template** dropdown list.

To select a template for each question type, check **Chart templates by question type**. Then, select a template name for one or both question types: **Multi-Select** and **Single-Select**. If you select a template for only one question type, the Reporting wizard will use the **Default chart template** for the other question type.

When finished, click **Next**.

10 When the Reporting wizard has collected all of the instructions for creating the presentation, you are prompted to continue. Click **Finish**.



The Reporting wizard creates the new PowerPoint presentation.

Note: If you copy and paste live Inquisite data from one PowerPoint presentation to another, you will not be able to refresh the presentation with updated Inquisite survey data.

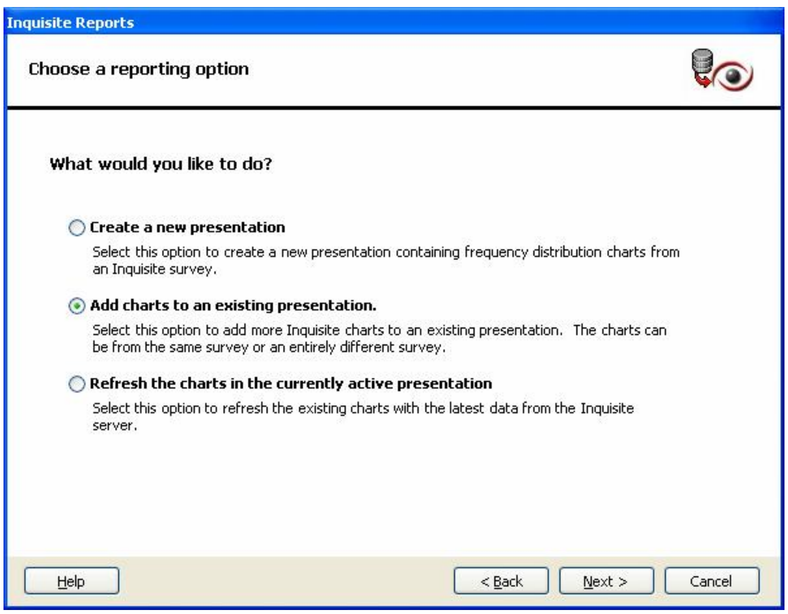
Adding charts to an existing PowerPoint presentation

Tip: To quickly apply formatting to a new unformatted slide in PowerPoint, cut and paste the slide so that it is positioned after a formatted slide. This technique may be useful if you create slides (agenda or background, for example) before adding the survey data charts. After you add the formatted charts with the Reporting wizard, move the unformatted slide to a position after the formatted slides. The formatting is applied to the moved slides. Then, order all of the slides as desired.

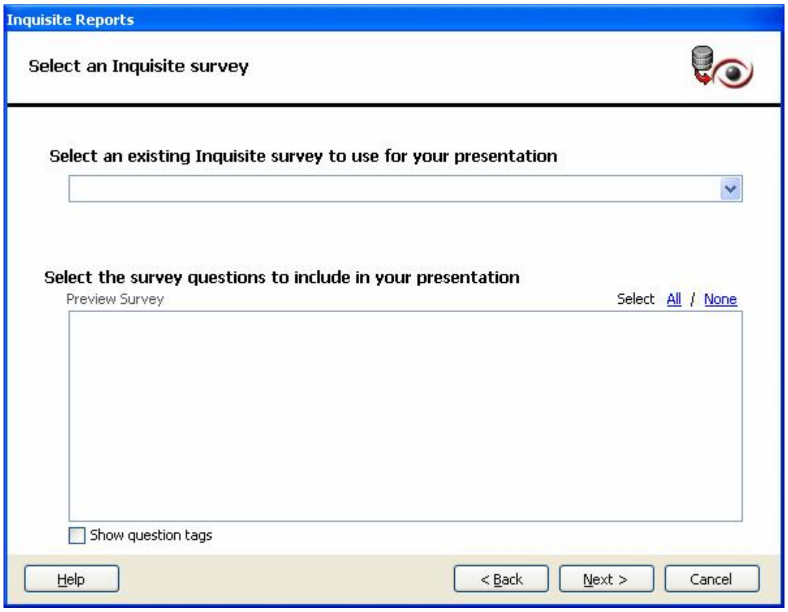
To add charts to an existing PowerPoint presentation, complete these steps:

1. Open the PowerPoint presentation to update and click **Inquisite Reports** from the PowerPoint toolbar.
2. From the **Welcome to the Inquisite Reporting Plug-In** screen, enter your e-mail address and password. If your environment includes more than one Inquisite server, you will see the **Server** dropdown list. Select an Inquisite server from the **Server** dropdown. When finished, click **Log In**.
3. You are prompted to choose a reporting option.

   Click **Add charts to an existing presentation** and then **Next**.

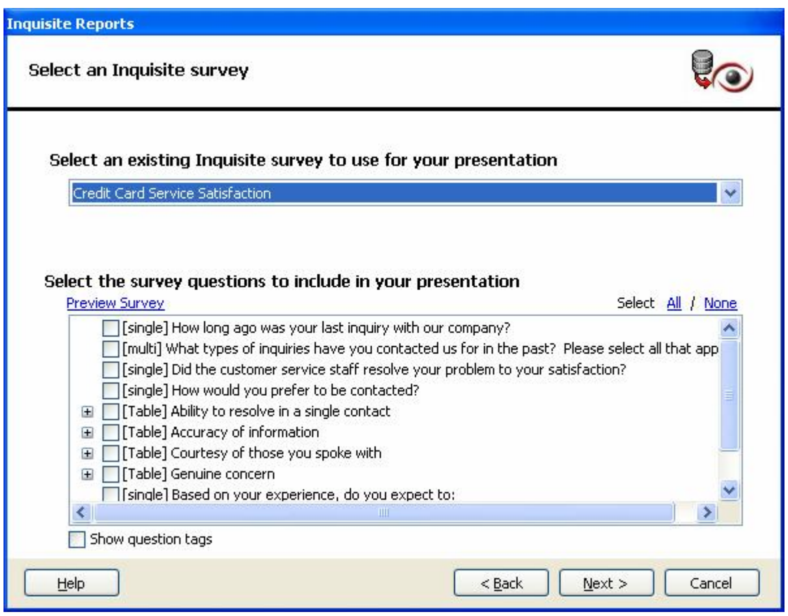


4 The **Select an Inquisite survey** screen is displayed.



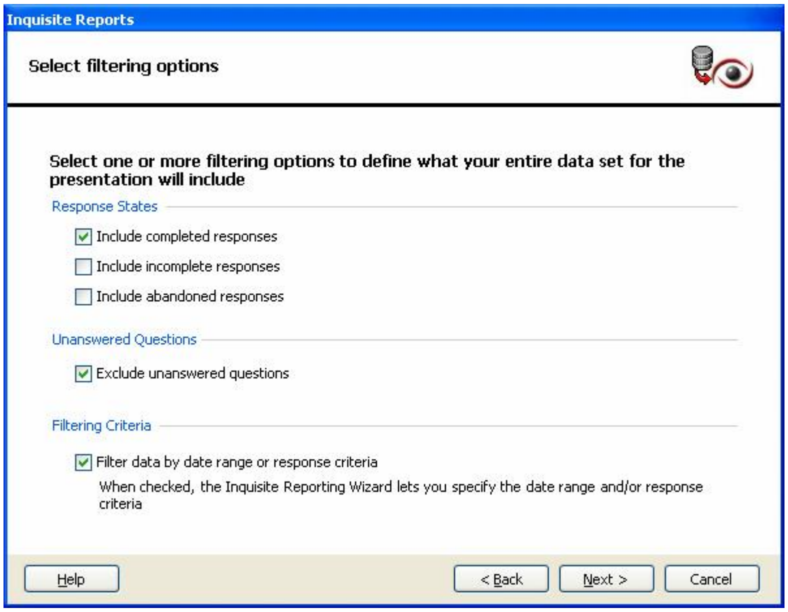
Select the Inquisite survey to use from the dropdown list.

5 Questions from survey are displayed. Select the survey questions to include in your presentation.



You can click **All** or select individual questions. When finished, click **Next**.

6 The **Select filtering options** screen is displayed. Use this screen to define the entire data set for the PowerPoint presentation.

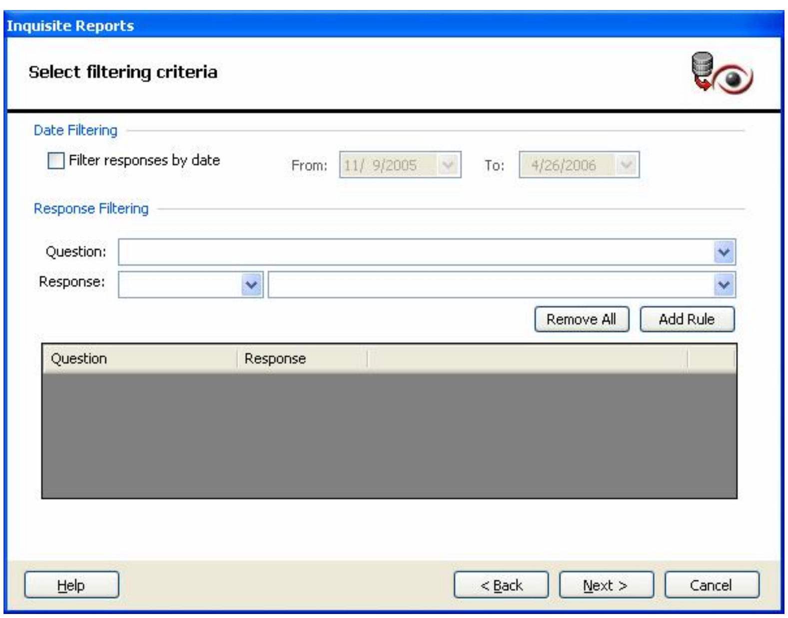


For information about the options on this screen, see page 38.

To filter by dates or responses, click **Filter by date range or response criteria** and then **Next**.

If you do not want to filter by date or response, ensure that **Filter by date range or response criteria** is unchecked. Click **Next** and skip to step 8.

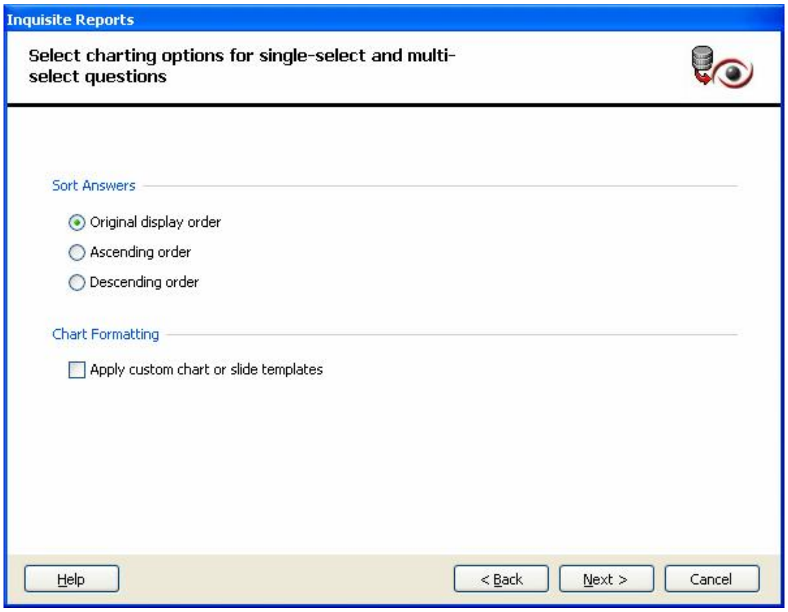
7 If you checked **Filter by date range or response criteria**, the **Select filtering criteria** screen is displayed. Use this screen to create report queries.



For information about the options on this screen, see page 39.

When you are finished constructing the report filters, click **Next**.

8 The **Select charting options for single-select and multi-select questions** screen is displayed. Use this screen to specify how charts are formatted for single-select and multi-select questions.

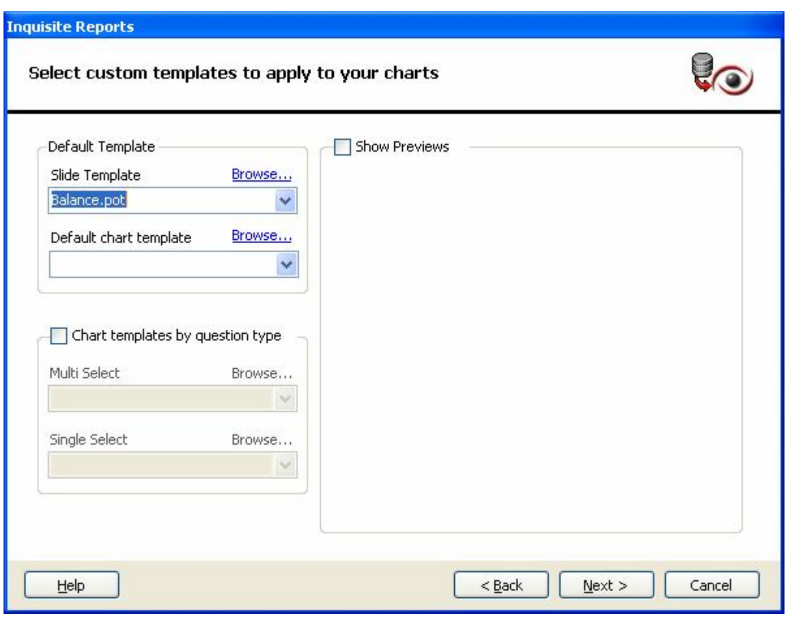


For information about the options on this screen, see page 41.

To use a custom chart or slide template for single-select and multi-select questions, check **Apply custom chart or slide templates**. If you do not want to apply a custom chart template, click **Next** and skip to step 10.

When finished click **Next**.

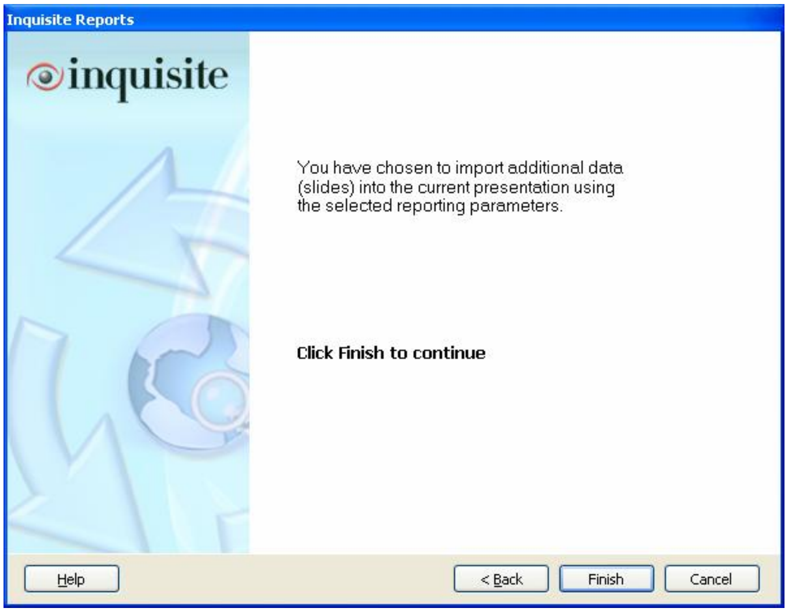
9 If you checked **Apply custom chart or slide templates**, you will see the **Select custom templates to apply to your charts** screen. Use this screen to apply a custom template—yours or any template from PowerPoint—to slides and to charts created for single-select and multi-select questions. If you don't select a **Default Template** for slides or charts, the Reporting wizard uses PowerPoint's default slide and chart template.



For information about the options on this screen, see page 42.

When finished, click **Next**.

10 When the Reporting wizard has collected all of the instructions for creating the presentation, you are prompted to continue. Click **Finish**.



The Reporting wizard adds the new charts to the existing PowerPoint presentation.

Note: If you copy and paste live Inquisite data from one PowerPoint presentation to another, you will not be able to refresh the presentation with updated Inquisite survey data.

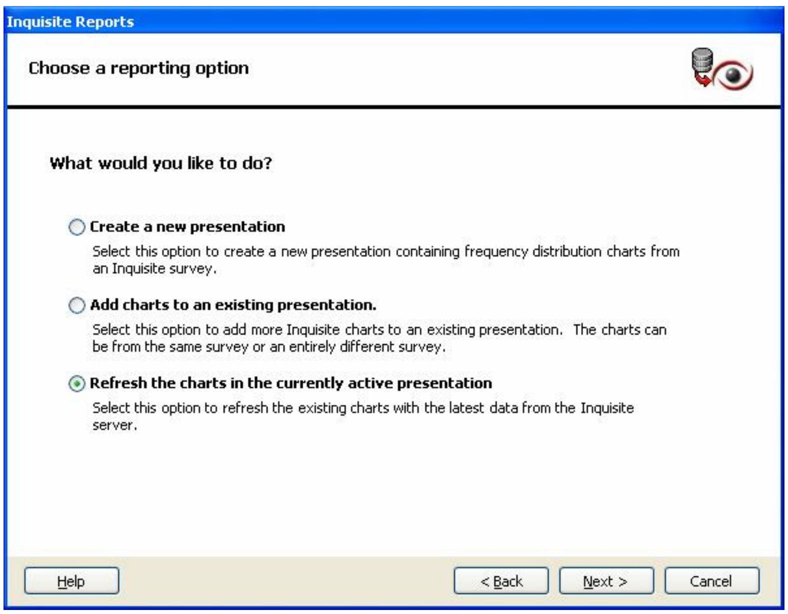
Updating a PowerPoint presentation with new survey data

Note: Refreshing a presentation with updated Inquisite survey data does not update survey questions in the presentation. That is, if you make changes to the survey after creating a new presentation and then refresh the presentation, these changes will not be included in the refreshed presentation. If the survey questions change after you create the presentation, consider creating a new presentation.

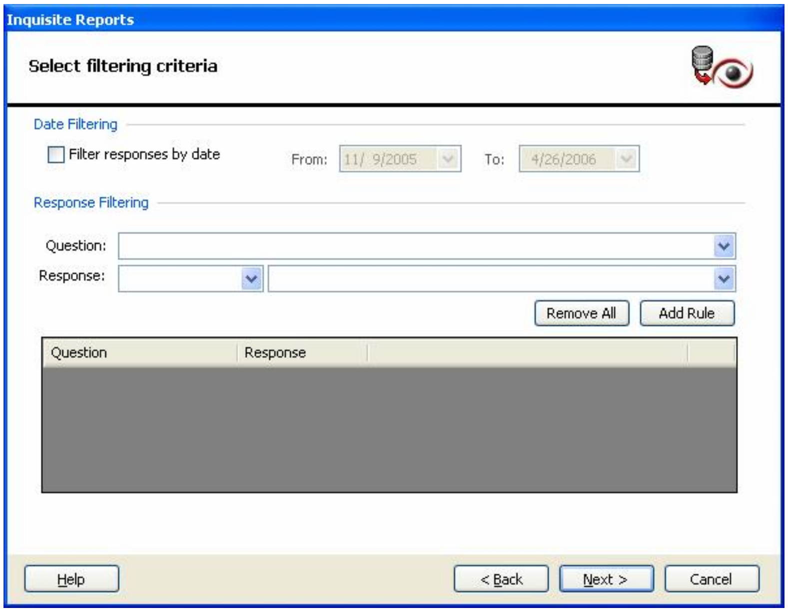
To refresh an existing PowerPoint presentation with updated Inquisite survey data, complete these steps:

1. Open the PowerPoint presentation to update and click **Inquisite Reports** from the PowerPoint toolbar.
2. From the **Welcome to the Inquisite Reporting Plug-In** screen, enter your e-mail address and password. If your environment includes more than one Inquisite server, you will see the **Server** dropdown list. Select an Inquisite server from the **Server** dropdown. When finished, click **Log In**.
3. You are prompted to choose a reporting option.

   Click **Refresh the charts in the currently active presentation** and then **Next**.



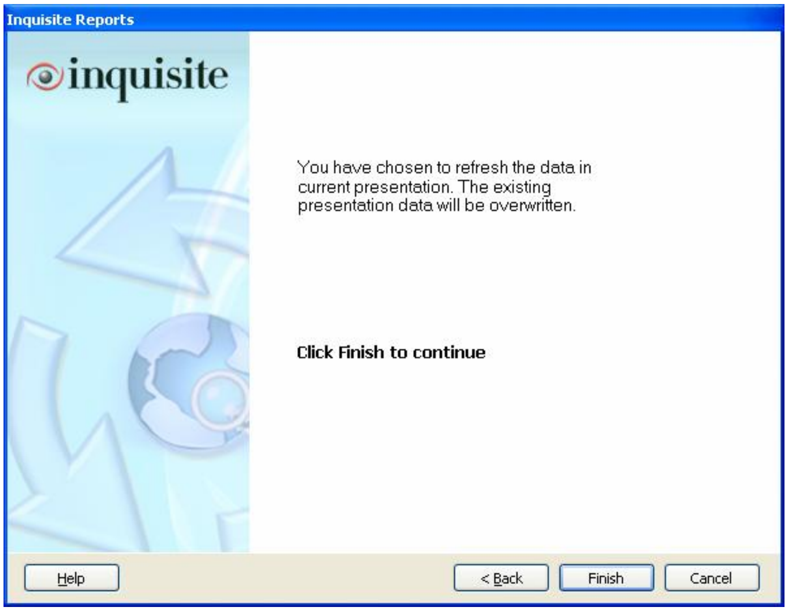
4 The **Select filtering criteria** screen is displayed. Use this screen to create report queries.



For information about the options on this screen, see page 39.

When you are finished constructing the report filters, click **Next**.

5 When the Reporting wizard has collected all of the instructions for updating the presentation, you are prompted to continue. Click **Finish**.



Note: If you copy and paste live Inquisite data from one PowerPoint presentation to another, you will not be able to refresh the presentation with updated Inquisite survey data.

Using custom templates in Excel and PowerPoint

With the Reporting wizard, you can assign your own templates to create charts for multi-select and single-select questions.

Note: To access custom templates each time you use the Reporting Plug-In (without using **Browse**), save them to this directory: **C:\Documents and Settings\username\Application Data\Microsoft\Templates**. If a template is stored in a different location, you must use **Browse** to locate it.

To learn more about creating Excel and PowerPoint templates, visit the following site. You will also find Excel templates to download at this site:

http://www.inquisite.com/Downloads/ExcelTemplates_InquisiteReportingPlugin.zip

Tip: If you want your charts to display percentages, ensure that you create the chart template with percentages. Otherwise, the values will be displayed as numbers. For example: **.5** instead of **50%**.

Tip: To accommodate long survey questions, ensure that you allow enough space in the template title area. Place the plot area near the bottom of the chart.

Creating a chart template (.xlt file) in Excel

To create an .xlt file to use for Excel charts, complete these steps:

1. Open Excel.
2. Using dummy data, create an Excel chart by selecting **Insert>Chart**.
3. Adjust the chart type and/or formatting to create a preferred appearance.
4. Highlight the chart and select **File>Save As**.
5. In the **Save as Type** dropdown box, select **Template (*.xlt)**. By default, Excel saves the template in the **Documents and Settings\Microsoft\Templates** directory.

Creating a master slide template (.pot file) in PowerPoint

To create a .pot file to use for PowerPoint slides and charts, complete these steps:

1. Open PowerPoint.
2. To create a master slide, select **View>Master Slide**.
3. Adjust the slide formatting to create a preferred appearance.
4. Select **File>Save As**.
5. In the **Save as Type** dropdown box, select **Template (*.pot)**. By default, PowerPoint saves the template in the **Documents and Settings\Microsoft\Templates** directory.

Applying a custom template

You can use your own custom template or any of Microsoft’s templates for Excel or PowerPoint. To use a custom template for an Excel or PowerPoint chart, complete these steps:

1. Create a report with the Reporting wizard.
2. In the **Select charting options for single-select and multi-select questions** screen, check **Apply a custom chart template** (for Excel). In PowerPoint, check **Apply custom chart or slide templates**.

   The **Select custom templates to apply to your charts** screen is displayed.

3 To apply a template to the Excel worksheet or PowerPoint presentation, select the template name from the **Default chart template** (or **Slide template** in PowerPoint) dropdown list. If nothing is selected in this list, the Reporting wizard uses Excel's (or PowerPoint's) default template to create the chart.

Click **Browse** to locate the template, if you don't see it in the dropdown list.

4 To apply a chart template by question type (multi-select or single-select), check the **Chart templates by question type** box and then the template name from the **Multi-Select** and **Single-Select** dropdown lists.

Click **Browse** to locate the template, if you don't see it in the dropdown list.

Troubleshooting

Use this section as a guide to troubleshooting unexpected issues with the Reporting Plug-In. If you are unable to resolve the issue with the information presented here, contact Inquisite technical support at:

support@inquisite.com

512.328.2943

Error log

The Reporting Plug-In logs errors to the **ReportingPlugin.txt** file, located in the Reporting Plug-In installation folder (specified at install time). Check this log when you perform troubleshooting. If you contact Inquisite technical support, forward this log file to them.

Installation issues

Do you have the appropriate privileges to install software on your workstation?

In some corporate environments, many users are not granted sufficient privileges on their workstations to install software. If this is the case, you may see errors similar to **File access not allowed**. To overcome this restriction, you may require assistance from your organization's IT staff.

Do you have internet connectivity?

If you do not have the Microsoft .NET framework or certain Microsoft components already installed on your workstation, the Plug-In installer will make an attempt to download components from Microsoft's web site in the initial installation phase. This process requires a connection to the internet.

Using the Plug-In

The Plug-In button doesn't appear on the Excel or PowerPoint toolbar.

- From the Excel or PowerPoint menu bar, select **Help>About>*Disabled Items***. If the Inquisite Plug-In is in this list, select it and click **Enable**. Then, restart Excel or PowerPoint and check if the button is displayed on the toolbar.
- To check if the Reporting Plug-In has been added, follow these steps:

  1. From the Excel or PowerPoint menu bar, select **Tools>Customize**.
  2. Click the **Commands** tab.
  3. In the **Categories** box, select **Tools**.
  4. From the **Commands** box, click and drag **COM Add-Ins** to the Excel or PowerPoint toolbar. This adds a new **COM Add-Ins** button to the toolbar. You will use this button to check if the Reporting Plug-In functionality has been added to Excel or PowerPoint.
  5. From the **Customize** dialog box, click **Close**.
  6. From the Excel or PowerPoint toolbar, click **COM Add-Ins** to display the **COM Add-Ins** dialog box.
  7. Check if **ReportingAddIn** is in the list and checked. Look for errors at the bottom of this window. If you see errors, contact Inquisite technical support.

I see an error when clicking Inquisite Reports from the Excel or PowerPoint toolbar.

Do you have any server configurations set up?

- If the Builder is installed on your workstation, open the Builder and select **Tools>Configure Servers**. You should see at least one server configuration in the list.
- If the Builder is not installed, browse to the installation directory for the Reporting Plug-In. The default directory is **C:\Program Files\Inquisite75**. Double-click **ConfigServers**. You should see at least one server configuration in the list.

Internet issues

Do you have internet connectivity?

Try opening a browser to verify the internet connection.

Does your network use proxy servers for internet access?

Check with your IT staff. If proxy servers are used on your network, and the server you are trying to access is set up to use a proxy server, ensure that the **Proxy Configuration** setting is correct.

To check a server's proxy configuration, do the following:

1. Open the Builder.
2. Select **Tools>Configure Servers**.
3. From the **Configure Servers** dialog box, select the server.
4. Click **Edit**.
5. Select the **Proxy Configuration** tab.

   The setting entered for the Builder will also be used by the Reporting Plug-In.

Glossary

Abandoned response

An incomplete response that is not resumed within a specified time period.

When survey respondents initially click a link to begin a survey, they generate a survey session on the Inquisite server that retains all of their responses to the survey. These sessions can remain active on the server indefinitely as long as a respondent is actively entering responses or navigating through the survey. When a respondent has an active survey session, that respondent is considered to be *in-progress*. However, if a respondent abandons a survey or has a period of extended inactivity, then the session on the server will time out. When this occurs, the respondent will be unable to resume the previous session and must start a new session and reenter all survey data.

The time-out threshold for periods of respondent inactivity is set with the survey administration tool (**Response Management: Advanced Settings**). The default setting for number of days to retain in-progress sessions that have not been saved is seven days. The default setting for number of days to retain in-progress sessions that have been saved is 30 days.

See also *Incomplete* response.

Banner point

A column in a cross-tabulation report that segments survey data.

Cross-tabulation report

Summarizes the relationship between questions. The report pivots one question horizontally (the “column” question) against one or more questions vertically (the “row” questions). Use a cross-tabulation report to show the joint distribution of two or more questions at the same time. The questions you select as cross-tabs will segment your survey data in the Excel cross-tabulation report. Valid question types for cross-tabulation reports are single-select and multi-select questions. To add more dimensions to a cross-tabulation report, you can build in filters on date and responses.

Frequency distribution report

Summary that provides a count of how often a respondent chose each available answer and what percentage of the total available answers the count represents.

Hidden question

A question that is not visible to the respondent. Hiding a question is useful with demographic questions in which you already know the answer for a respondent. Hidden questions are still available for reporting. For example, you might include an employee's current department code by prepopulating the field instead of requesting information you already have from the respondent.

Incomplete (partial or in-progress) response

A survey respondent starts a survey but does not complete the survey by clicking **Finish**. The following scenarios can create an incomplete response:

- The respondent clicks the survey URL without the intention of completing the survey and then closes their browser.
- The respondent starts the survey and saves with the intention of resuming later.
- The respondent completes the survey and reaches the last page but closes their browser instead of clicking **Finish**.

See also Abandoned response.

Memo (paragraph) question

Text question that may be prepopulated with information: city, state, or salary, for example. The information may be hidden in the survey but may be visible in the wizard. These responses can be fed into other CRM applications.

Multi-select question

Questions that allow multiple responses. Multi-select questions can be formatted as checkboxes or dropdown lists.

Numeric question

Text question that is validated to accept only numbers.

Partial response. See *Incomplete response*.

Percent option

Lets you choose to calculate a percentage of the total number of responses *or* total number of respondents. This option, available in the **Select cross-tabulation data and format options** screen, defines the denominator value for calculating percentages in frequency distribution reports.

Consider the following example of a survey question with 70 respondents. Forty respondents selected blue; 10 respondents selected red; and 20 respondents selected both blue and red.

Selecting **Respondent** creates a report based on the percentage of respondents for each color. Blue has a count of 60 and 85% (60/70). Red has a count of 30 and 42% (30/70).

Selecting **Response** creates a report based on the percentage of responses for each color. Blue has a count of 60 and 66.3% (60/90). Red has a count of 30 and 33.3% (30/90).

Question tag

Field that attaches a unique identifier to a question. A question tag must be 16 alphanumeric characters or fewer.

Rank question

Lets respondents indicate a preference for or rank available choices. A rank of 1 is the most preferred of available choices. Each choice has a button next to it. Respondents click the button to rank the choice from 1 to *n*, where *n* is the number of choices.

Report workbook

Excel file that includes multiple reports, each on a separate Excel worksheet. The Reporting wizard creates a table of contents at the front of each report workbook that links to the individual worksheets.

Response states

Defines the status of a respondent’s survey. Response states include *complete*, *incomplete* and *abandoned*.

Single-select question

Question that allows one response. Single-select questions can be formatted as radio buttons, dropdown lists or checkboxes.

Table question

Displays two or more related questions in a grid layout. Format a question in a table if the question contains two or more scale answers, such as *rating* and *importance*.

Text question

An **edit field** restricts the number of characters to 255 or fewer and is typically used to collect demographic information such as name and address. A **memo field** restricts the number of characters to 32,000 or fewer characters and is used when you are collecting more extensive information that will not fit into an edit field.

Top and bottom boxes

Displays the count and percent of the specified number of top and bottom responses to single-select questions.

This measure is relevant for scale questions. For example, you can use this measure to report on satisfaction questions as follows: a survey may include a scale question that measures satisfaction with the responses—Strongly Agree, Agree, Neutral, Disagree and Strongly Disagree. Because respondents are often less likely to choose the top and bottom of a scale, reporting on the top two and bottom two answers to this question may more accurately represent the survey results.

Specifying the number of top and bottom boxes will also shade the top ranked responses in the ranking questions report.

Trending

Creates banner points in your report. A banner point is a column in a cross-tabulation report that segments the data in the same way that a cross-tabulation question does. Applying trending to cross-tabulation questions helps you to analyze survey responses over time.

Unanswered questions

Unanswered questions included in your data set may skew the survey results. For example, if your pool of respondents totals 10 and three respondents give the same answer but one person does not answer the question, the result for that answer should be 33% (3/9), not 30% (3/10).

Workbook. See *Report workbook*.

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